

2017

REPERTOIRE PROGRAMMING
DECISIONS OF MAJOR WEST COAST
OPERA COMPANIES
IN WASHINGTON, OREGON, AND
CALIFORNIA

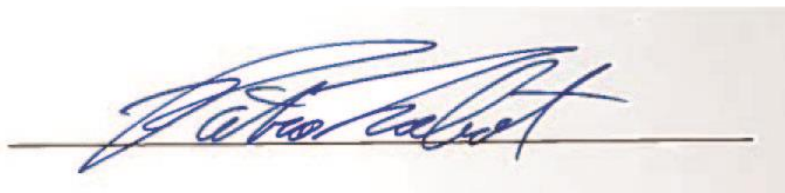
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PROJECT APPROVAL PAGE

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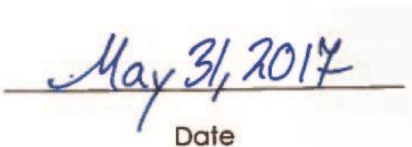
This project has been accepted and approved in partial fulfillment of the requirements for the Mast of Arts degree in the Arts and Administration Program by:

A photograph of a handwritten signature in blue ink on a white background. The signature is written over a horizontal line and is highly stylized and cursive.

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A photograph of a handwritten date in blue ink on a white background. The date is written over a horizontal line and is in a cursive style. Below the line, the word "Date" is printed in a small, black, sans-serif font.

ACKNOWLEDGEMENTS

TO MY RESEARCH ADVISOR, DR. PATRICIA DEWEY-LAMBERT, WHOSE POSITIVE ATTITUDE AND FIRM HAND GUIDED ME THROUGH THE RESEARCH PROCESS.

TO MY FIANCE, EVAN, FOR HIS UNWAIVERING LOVE, KIND ENCOURAGEMENT, AND STEADFAST SUPPORT OF ALL MY PURSUITS, GREAT OR SMALL.

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Contents

PROJECT APPROVAL PAGE	1
ACKNOWLEDGEMENTS	2
ABSTRACT	6
PROBLEM STATEMENT	7
CONCEPTUAL FRAMEWORK	9
RESEARCH METHODOLOGY	11
PURPOSE STATEMENT	11
METHODOLOGICAL PARADIGM	11
ROLE OF THE RESEARCHER	12
RESEARCH QUESTIONS.....	13
DELIMITATIONS AND LIMITATIONS	14
BENEFITS OF THE STUDY	15
RESEARCH DESIGN	16
RESEARCH APPROACH/DIMENSIONS OF RESEARCH	16
STRATEGY OF INQUIRY	16
OVERVIEW OF RESEARCH DESIGN	17
ANTICIPATED ETHICAL ISSUES	18
EXPECTATIONS	19
DATA COLLECTIONS AND ANALYSIS PROCEDURES	19
OVERVIEW.....	19
RESEARCH POPULATION AND RECRUITMENT METHODS	20

INFORMED CONSENT PROCEDURES 21

PROVISIONS FOR PARTICIPANT AND DATA CONFIDENTIALITY 22

POTENTIAL RESEARCH RISKS OR DISCOMFORTS TO PARTICIPANTS 22

DATA COLLECTION AND DISPOSITION PROCEDURES 23

PRELIMINARY CODING AND ANALYSIS PROCEDURES 23

STRATEGIES FOR VALIDATING FINDINGS 24

INVESTIGATOR EXPERIENCE 24

CHAPTER 2- THE PERFORMING ARTS IN MODERN AMERICA 26

AMERICAN ARTS FUNDING IN THE 20TH CENTURY 27

THE ARTS TO COMBAT COMMUNISM 28

NEA CULTURE WARS BUDGET CUTS 28

PERFORMING ARTS IN THE MODERN ERA..... 30

INNOVATION TO COMBAT CHANGE 32

CHAPTER SUMMARY 40

CHAPTER 3 – A HISTORICAL OVERVIEW OF AMERICAN OPERA 41

OPERA IN THE 19TH CENTURY 41

A BRIEF HISTORY OF THE METROPOLITAN OPERA 44

PROGRAMMING IN AMERICAN OPERA COMPANIES IN THE LATE 20TH CENTURY..... 48

CHAPTER 4- COLLECTIVE CASE STUDY..... 52

INTRODUCTION 52

NATIONAL OPERA COMPANY COMPARISON ANALYSIS 53

THE DALLAS OPERA..... 54

HOUSTON GRAND OPERA 55

LYRIC OPERA OF CHICAGO 56

THE SANTA FE OPERA 57

LOS ANGELES OPERA.....	58
COLLECTIVE CASE STUDY ANALYSIS.....	59
PORTLAND OPERA	59
SEATTLE OPERA.....	64
SAN FRANCISCO OPERA	67
CHAPTER SUMMARY	70
<u>CHAPTER 5- FINDINGS AND RECOMMENDATIONS.....</u>	<u>71</u>
RESTATEMENT OF PURPOSE.....	71
RESEARCH QUESTIONS	71
SUMMARY OF FINDINGS	72
RECOMMENDATIONS	74
AVENUES FOR FUTURE RESEARCH	76
CONCLUSION.....	77
<u>APPENDICES.....</u>	<u>79</u>
APPENDIX A: CONCEPTUAL FRAMEWORK SCHEMATIC.....	79
APPENDIX B: DETAILED RESEARCH TIMELINE	80
APPENDIX C: INTERVIEW PROTOCOL.....	81
APPENDIX D: RECRUITMENT LETTER.....	82
APPENDIX E: CONSENT FORM.....	84
APPENDIX F: INTERVIEW QUESTIONS.....	87
APPENDIX G: RESUME.....	88
APPENDIX H- CITI TRAINING COMPLETION FORM	90
<u>REFERENCES.....</u>	<u>91</u>

Abstract

This graduate research project serves as a guide for emerging leaders and arts professionals in understanding the relationship between artistic programming choices of North American opera companies, and community participation in the art form. Studies and statistics echoed through a variety of media outlets over the past 10 years have recorded a significant drop in opera attendance, which many opera companies have attempted to combat with new or re-energized artistic programming. A gap in research exists between the repertoire programming process of American opera companies, and the community engagement it fosters. This study presents: a literature review of the challenges facing performing arts organizations in the United States; a comprehensive history and contemporary analysis of opera in the United States; a collective case study of the San Francisco Opera, the Portland Opera, and the Seattle Opera; a set of considerations for arts administrators using the case study findings. After collecting data from all three sites, the findings uncovered that many opera companies do not include the many functional areas of the organization to help select repertoire, but rather rely solely on the Executive Director to make the annual programming decisions. The main recommendation stemming from the findings are that more companies should work to include key staff and department heads in the repertoire programming process. By ensuring collaboration and harnessing the creativity of their arts leaders, opera can both stay relevant in modern society and grow into an avenue for innovative and timely storytelling.

Key Words: Opera in America, season programming, repertoire selection, West Coast.

Problem Statement

Over the past 10 years, there has been declining interest in American opera resulting in small audiences and struggling organizations. The decline is due to a wide variety of factors including the Great Recession of 2008, decrease in arts funding and education over the last 30 years, and the influence of new forms of technology, ever-increasing competition for leisure-time activities, and barriers of understanding in traditional opera.

To combat these factors, many opera companies around the US have adjusted their season programming to change public perceptions of an art form and attract audiences. Many have incorporated American musicals or crowd-pleasing operas into their seasons, as well as translating and marketing operas in English rather than their original language. Also in recent years, many companies have commissioned new works based on American literature, written by modern composers, with librettos in English. New approaches to selecting artistic repertoire and careful season programming are vital factors in developing and sustaining opera audiences into the future.

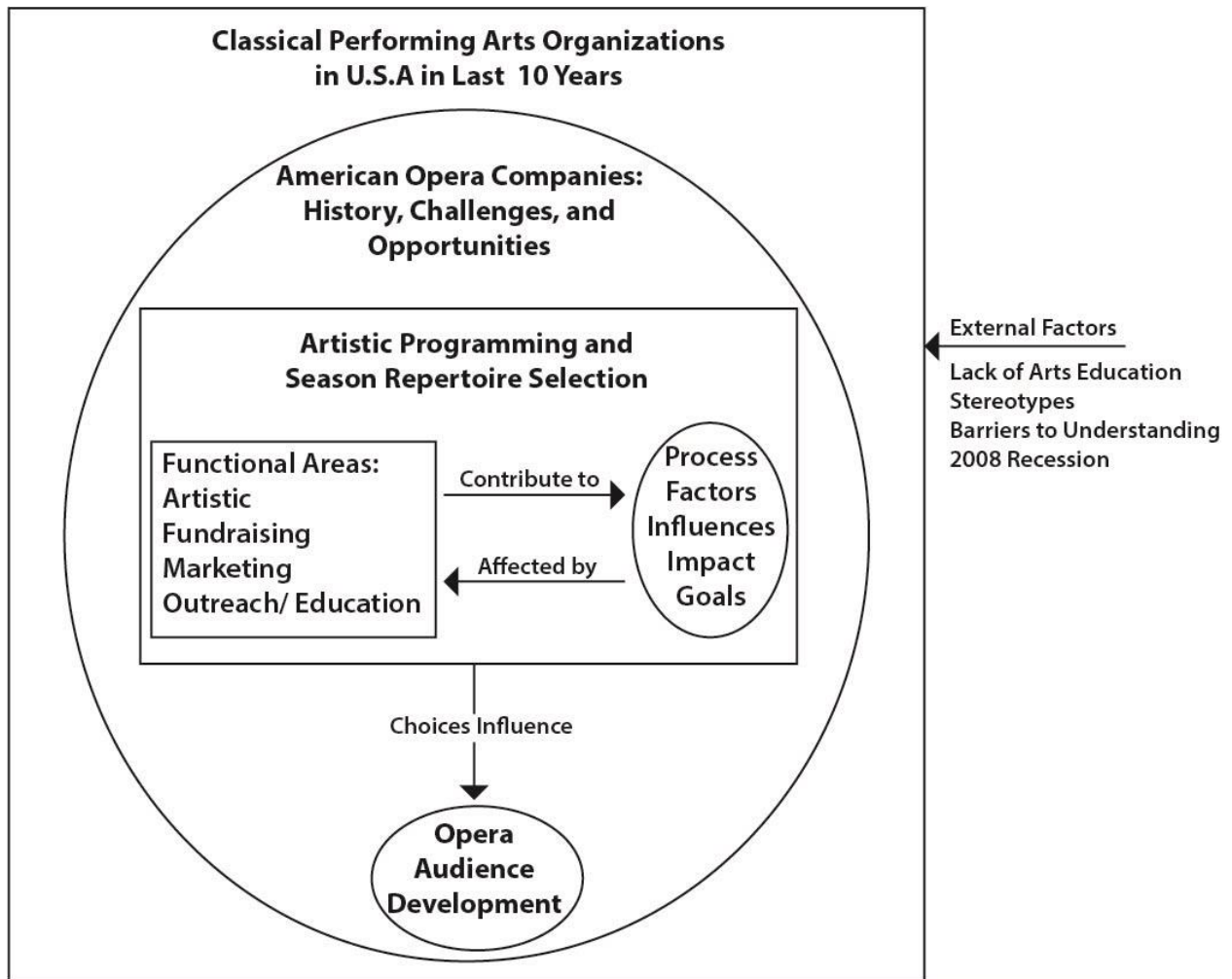
There is a gap in research on how programming decisions are related to audience development initiatives of performing arts organizations, and the reasoning behind season repertoire selection. In the past, these decisions could be left to the organization or artistic director to choose based on feeling, budget, or traditions. However, the economic hardships and decrease in opera audience members

demands a more attentive, holistic approach to programming to benefit the organization in the long run. Detailed information on the contributing factors involved in choosing repertoire is needed. Also, because programming influences audience size and audiences promote earned-income to the company, it is important to explore the many operational units of an opera company and discover their influence on programming decisions.

Conceptual Framework

My conceptual framework found in Figure 1 outlines the trajectory of my research project and served as a foundation for my research paper.

Figure 1: Conceptual Framework



The large outer box labeled “Classical Performing Arts Organizations in the USA in the last 10 years” served as an activity in understanding the history, opportunities, and challenges of the broader performing arts sector. Subsequently, my first literature

review, entitled *Performing Arts in the Modern Era*, details American Arts Funding in the 20th century and combating change in the modern performing arts of the 21st century.

Within the box, the circle encapsulates the general focus of my project, *American Opera Companies: History, Challenges, and Opportunities*. This leads into my second literature review, a *Historical Review of American Opera*, which illustrates: the history of American opera as far back as the 19th century and the humble beginnings of today's leading opera houses in New York, Chicago, and San Francisco; a brief exploration of programming in American opera companies in the late 20th century.

The innermost box, *Artistic Programming and Season repertoire*, encapsulates what I wanted to gain more insight on through my collective case study. By observing the relationship between the internal factors of the organization, I hoped to discover how the various functional areas with the organization (i.e. artistic fundraising, marketing, etc.) contributed to and were affected by the process, factors, influences, impact and goals of the organization. I also hoped to gain more information through my informants about how external factors affecting opera and the classical music sector (i.e. lack of arts education, stereotypes, barriers to understanding, etc.) swayed repertoire programming if at all.

Ultimately, I had hoped to view how repertoire selection and the functions/processes associated with it influenced opera audience development and community engagement within my three case study sites. However, due to time constraints and lack of access to key informants, my case study mostly uncovered the programming processes of each opera company while also looking at the positive and

negative effects of external factors, like stereotypes and lack of funding, in the opera field detached from choosing repertoire.

Research Methodology

Purpose Statement

The purpose of this study was to gain understanding of the external and internal factors of opera audience participation nationwide, and explore the determinants of operatic programming among major West Coast opera companies.

Methodological Paradigm

In general, my qualitative research project was hermeneutic and practical in nature. This was due to my conceptual framework and research design that involved compiling information through literature review, comprehending the external factors impacting American opera companies, and collecting information from informants in the industry. Once I had a strong understanding of the topic, I switched to an interpretivist or constructivist paradigm to critically review opera programming choices and offer solutions. Because my research involved the actions and opinions of human beings, the qualitative approach helped to interpret, observe, and explore the subject of opera programming effects on organizational health and audience development without generalizing the information into a strictly scientific framework.

In my research, I gained knowledge through literature review, observation, and interviews. Literature review was instrumental in my search to assist in understanding of performing arts audiences in the U.S. as well as the evolution of American opera. Observation of programming trends through key informants allowed for a more comprehensive understanding of each organization's operations as well as a more detailed process behind repertoire choices related to season programming.

Role of the Researcher

As a former opera singer, I find the declining audience numbers in opera disheartening for an art form I love so dearly. Even though I am classically trained, I do recognize that opera has a unique set of challenges in the modern world. As an ancient musical form with significant barriers to its understanding and appreciation like language, length, and engagement, opera does not appeal to certain audience demographics. Due to the large amount of education needed to understand a performance, coupled with societal norms, opera holds a negative reputation as being "stuffy," "elitist," or "a dying art form". Through my research and my career, I would like to break down these barriers and work toward making opera more accessible to the public using current and future methods of repertoire selection to develop the art form into a successful and relevant genre of the performing arts.

Research Questions

Through my research, I wanted to address the problem of declining opera audiences. To do so, I explored the current challenges through literature review of performing arts agencies in the United States, American opera history, and web-based reviews of current opera programming trends. By gathering more information on nation-wide trends of opera programming, I found greater insight and reasoning behind season programming of my three case study sites and the effect on opera audiences.

Main Research Question: *What are the external and internal factors on the selection of season repertoire and programming taking place in major opera companies on the West Coast?*

Sub questions:

1. *What is involved in the programming process and who are the key decision makers?*
2. *How is repertoire chosen, and for what reasons?*
3. *Is the season programming relevant to current events or societal trends?*
4. *What are the changes, challenges, strengths and opportunities of opera programming and how is repertoire selected to combat this change?*

Delimitations and Limitations

The scope of this study was significantly narrowed by focusing on three large opera companies of the West Coast only. For the purposes of this study, the “West Coast” refers to the states of Washington, Oregon, and California. To further delimit the study, I narrowed the criteria to include companies that were personally accessible by train or car from Eugene, OR and were considered “leading companies”. Leading opera companies, for my research purposes only, were defined as: having large annual budgets; operating in large, metropolitan areas; reputation in the opera community. Portland Opera, while it does fit these criteria, was selected mostly to explore and understand the current performance season restructuring as well as represent opera in the state of Oregon.

The collective case study consisted of interviews with the key informants being upper-level arts administrators in various departments of the organization. These informants had more insight and information about the programming process; however, due to the size of the three organizations, was difficult to obtain interviews with upper-level administrators. It was also difficult to recruit informants from the other functional areas of the organization because the repertoire programming process did not include the department in decision making.

The main limitation of this research project is that the results and findings are not generalizable to other organizations. Given that the research was conducted on three opera companies in a specific geographic region of the United States, the data cannot be applied to other opera organizations. If a case study is taken out of its original

research area, it cannot be expected to prove the same point and show the same result.

Benefits of the study

The groups to receive the most benefit from this research are current and future arts administrators in the opera field. One of the main benefits from this study is to contribute sound research on the repertoire selection in leading opera companies, as well as add literature to the subject of American operatic programming. In decoding the decision making behind headline opera companies' repertoire selection process, further exploration of external and internal factors of American opera companies can be pursued.

This research also allows arts administrators to look at season programming selection through a broader lens. In today's performing arts environment, artistic repertoire choices do not simply affect one department or portion of the organization. The organization at large is affected by their repertoire choices, and therefore all departments serve an important role in selecting, planning, promoting, and implementing each season.

Research Design

Research approach/dimensions of research

This study was conducted to answer the question, “what are the external and internal factors on the selection of season repertoire and programming taking place in major opera companies on the west coast?” This was applied research through which I discovered a variety of factors contributing to the selection of seasonal operatic programming. I also hoped to explore the effect said programming had on departments within the organization, audiences, and national artistic trends; however, time and access prevented connection between programming and audience development. This research served as an advancement of fundamental knowledge and provided recommendations for current and emerging arts leaders to develop a set of repertoire planning “best practices” to encourage audience engagement. Due to the curious and exploratory nature of the process, the best way to conduct research on this topic was through an extensive literature review and collective case study.

Strategy of Inquiry

For the purposes of this research project, a collective case study proved to be the best method to develop a strategy of inquiry. Case studies are considered most appropriate as tools in the critical, early phases of new theory, when key variables and their relationships are being explored (Gibbert, Ruigrok, & Wicki, 2008,

p. 1465). In this instance, the case study and corresponding research instruments built relationships with art leaders, reached out for information, and secured vital answers regarding artistic programming in opera companies. Also, case studies are typically carried out in close interaction with practitioners, and deal with real management situations; therefore, they represent a methodology that is ideally suited to creating managerially relevant knowledge (Gibbert et. al, 2008, p. 1465).

Case studies are a strong research method because they allow for a qualitative research approach and allow for a deeper understanding of the overall research question. For my collective case study, I chose to focus on artistic programming and season repertoire selection of major opera companies. I chose the geographic location of the west coast to narrow down the focus of the research and then selected three opera companies.

Participants in the research were upper-level or mid-level staff members of the three opera companies, and were interviewed in March/April 2017. Key informants were interviewed in a structured process where interviews were recorded, documented in a summary with selective transcription, and deleted at the end of the research process.

Overview of research design

In exploring operatic programming and season repertoire selection, I chose three sites based on geographic location and size to study. I conducted research

on the San Francisco Opera in San Francisco, CA, the Portland Opera, in Portland, OR, and the Seattle Opera, in Seattle, WA.

Collecting data using interviews, I researched these sites through several key informants. These individuals were department heads or program directors of: the artistic administration departments; production departments; outreach/education departments. I contacted 15-20 individuals per site using the recruitment letter (see Appendix C), which explains the purpose of my research and their role in the data collection process. For the purposes of this study, I excluded lower-level employees in the selection process to delimit my informants and to ensure usable data on operatic programming. Human subject compliance protocols were followed for all data collection in this case study, and the CITI Compliance Form can be found in Appendix H.

Anticipated ethical issues

The main anticipated ethical issue in this research project involved the confidentiality of the interviewees. Consent forms (see Appendix E) were signed stating their agreement to the research and the release of their identity which included name, job title, and quotations in publications. All interview materials, including email correspondence, audio recording, video, transcripts, and summaries were kept in a password protected computer or device. Upon completion of the research project, the materials were wiped clean from the researcher's hard-drive and devices, eliminating any evidence of the interviewee.

Expectations

At the beginning, the research project had the ability to go one of two ways. The first is discovering, through various literature reviews and interviews with key informants, that opera programming is truly a holistic process and ultimately affects every aspect of the organization- from the various departments, to the development and increase in opera audiences. The second outcome would result in finding that programming and repertoire selection procedures are determined entirely by the Artistic Director and the artistic administration team with little or no input from the rest of the organization. This would result in little to no improvement on organization functionality or on audience development. I expected to find all departments of the organization working toward the collective effort and keeping audience participation/input in mind.

Data Collections and Analysis Procedures

Overview

In addition to a review of related literature, the study utilized interviews. Key department heads of each opera company were interviewed to gain in-depth information on the process of season programming and repertoire selection. These individuals were interviewed in-person or using skype/phone calls if they were unavailable during site visits. The interviews each lasted between half and one hour each (see Appendix F for a list of interview questions). After obtaining consent of

interviewees, the interviews were audio recorded and documented for accuracy of quotes and information.

Research population and recruitment methods

I interviewed one to three adults in each of the three opera companies of my case study, and included them in my data collection for the final comparative case studies. Altogether, I interviewed 5 individuals in the three case study organizations. Research participants were purposively selected based on their leadership position(s) within the three opera companies in San Francisco, Portland, and Seattle. All interviewees were professional adults.

Leaders in the opera companies targeted for this study were purposively identified for inclusion in the study, selected by their professional status, job title, and experience in the field. This was done by using publicly available staff listings located on the organization's website. Once the potential interviewees were identified, targeted research participants received a copy of the recruitment letter (Appendix D: Interview Recruitment Letter). Contacts were made initially through mailing recruitment letters, and followed by email and phone calls when necessary. Due to the size and scope of the three organizations, it was difficult to contact many of my invited informants and many more declined to participate due to their lack of involvement in the programming process.

Informed consent procedures

I performed the informed consent procedure, in compliance with training I received through research methods coursework, CITI training, and my faculty research advisor. All participants were recruited in compliance with Human Subjects guidelines. The recruitment Letter (Appendix D) describes the purpose, potential benefits, and potential risks to participating in the study.

I asked all research informants to sign a consent form (Appendix E) that expressed agreement to identify the participant by name in any written documents resulting from this study. Each interviewee was asked to consent to the use of their name and title in the final research report. Only individuals who provided consent to be identified as informants were interviewed. If appropriate, it was also suggested to participants that they obtain permission for participation in this study from their supervisor(s). Interviewees were asked to participate in a one-hour, audio-recorded, in-person interview, and be available for follow-up questioning via phone or email. Participants were encouraged to ask questions about the study. As stated in the consent form, interviewees could discontinue their involvement in the research at any time; they were also offered the opportunity to review their comments prior to publication of research findings.

Provisions for participant and data confidentiality

To safeguard the confidentiality of research participants, research notes and research documents were securely maintained by the principal investigator in a password-protected computer and locked home office file. Only the PI and faculty research adviser had access to the data.

Confidential institutional documents, data collection sheets and audiotape recordings will be destroyed one year after the conclusion of the research project. The reflexive journal was kept and stored in a safe place in the PI's place of residence.

Potential research risks or discomforts to participants

Given the benign nature of this study, very minimal risks existed in the category of social/economic risks due to the loss of confidentiality. Topics related to the audience numbers and community impact could be controversial and sensitive. Further, use of participants' names in written documents resulting from this study allows for the possibility of a participant's comments, as a representative of his or her institution, to displease that individual's colleagues and supervisor(s). That said, such risk was unlikely to occur and was addressed through standard informed consent procedures and review of statements prior to publishing as outlined in the Research Plan.

Data collection and disposition procedures

The data was collected and recorded in multiple ways. Audiotape recordings using a password protected iPad were used during interviews of key informants at each location, and aided in transcribing the interview. In addition to recording, field notes were taken on the interview protocol form found in Appendix C. The field notes included key points, important or interesting comments, and anything relevant to the study the interviewee discussed during the interview. The summaries of both the recordings and various field notes were stored on a password protected computer.

Maintaining confidentiality of participants was extremely important in the process. The consent forms sent out to participants allowed asked for explicit permission to use certain identifiers. Confidentiality was also maintained by storing all data on a password protected iPad and computer. Data will be erased and destroyed one year after the project has been completed; no data will be kept.

Preliminary coding and analysis procedures

Coding for this research study assisted in organizing and analyzing all data. The codes were keywords or phrases that allowed the data to be grouped and organized per their topics or categories. Preliminary codes were used as data collection began; others were determined as the research continued. As more data was collected and coded, themes and patterns began to emerge for analysis.

Strategies for validating findings

The data collected and the findings of this research study were validated through multiple techniques. Triangulation ensured the data was looked at from several different angles to increase validity. Member checks were used to ensure participants agreed with my interpretation of the data collected from interviews. Peer-debriefing was also used to be sure the findings of the study and the interpretations were reasonable and valid.

Investigator Experience

Brittney Leemon spent much of her early childhood living in Hawaii, Kentucky, Germany, and Virginia due to her father's military career. When finally settling in her family's native Wisconsin, Brittney developed a love of the arts through her school's art and music programs.

Brittney graduated in 2014 from Luther College in Decorah, IA with a Bachelor of Arts in Vocal Music Performance and Management. During her time at Luther, Brittney sang for three years in the college's flagship touring ensemble, the Nordic Choir, and had the opportunity to share the Lutheran choral tradition with audiences all over the country as well as the British Isles. It was also at Luther where Brittney found her true passion for opera- first as a performer, and later as a behind-the-scenes promotional manager of the annual show.

After completing her first year in the Arts and Administration program, Brittney spent the summer of 2016 in upstate New York at the Glimmerglass Festival, enjoying high-quality opera and gorgeous scenery as a Development Intern. In Eugene, Brittney serves on Cascadia Concert Opera's board as the Marketing and Public Relations Chair. Brittney also serves on the Emerging Leaders in the Arts Networks as the Administrative chair.

See Appendix G for Resume.

Chapter 2- The Performing Arts in Modern America

The performing arts, while broad in scope, will be defined for the purposes of this research project as an art form in which artists use their voices and/or bodies to convey artistic expression. The modern performing arts can be separated into three main categories of theatre, music, and dance, all of which include several disciplines within each category and are performed in front of live audiences. The performing arts of the United States, while often based in Western traditions, has developed over many years and many cultural influences into unique and vibrant art forms like jazz, film scoring, and interpretive dance. For centuries, the performing arts in American have been considered an entertainment staple; however, the modern performing arts organization and artists face a new set of both challenges and opportunities brought about by changing times and political upheaval.

The following chapter aims to outline the challenges and opportunities encountered by the performing arts sector of the United States in the latter half of the 20th century, and early decades of the 21st century. First, the formation of the National Endowment of the arts is outlined to further explore the various social, cultural, and political reasons as well as the following political fallout resulting in the re-structuring of the federal arts endowment. Second, the various changes in the modern performing arts is more fully examined through the lens of constructionist theory and using technology to enhance as well as innovate the opera sector.

American Arts Funding in the 20th Century

To position the arts with a sense of worth within the American federal government, the National Endowment of the Arts (NEA) was established in 1965 to create one single agency "dedicated to supporting excellence in the arts, both new and established; bringing the arts to all Americans; and providing leadership in arts education" (National Endowment of the Arts, 2016). After its creation on the federal level, state arts agencies began to form and created the patchwork of cultural policy networks we know today as cultural federalism.

Very different from the cultural policies of other developed nations, the United States through cultural federalism has created a sub-national cultural policy that allows for drastically different artist communities from state to state; but also, draws information and insight from the vast array of creative ideas unique to the environment it was created in. By using the "the 50 experiments in cultural policy embodied in the accumulated experiences of the 50 United States" (Schuster, 2002) sub-national policy allows for an untapped resource of information from the varying degrees of local arts agencies to learn from and improve upon. To rely solely on one single form for all arts agencies would be a grave misuse of the creative ideas unique to each state and would hinder the process of by identifying "smart practices" for innovating the structure and stimulating successful agencies (Schuster, 2002). While the agency has proved funding and grants for thousands of artists and organizations in its 52-year existence, it has a rather complicated relationship with the federal government.

The Arts to Combat Communism

Almost from the start, McCarthy era critics likened the new Endowment to that of Soviet totalitarian countries (Wyszomirski, 2004). This unfair representation shaped the American view of cultural policy and the arts through much of the 20th century, and even into the 21st century. The argument is not completely unfounded, however. Many communist countries like China and Russia or even Hitler's Germany, for political gain, put a lot of emphasis and funding into developing national heritage. With a unified definition of art and culture, it made gave the masses a singular idea of their leader's view for what the country was and the role everyone played in it. In stark contrast, the United States worked tirelessly throughout the Cold War and beyond to provide the American people with the freedom of market and expression outside of government control. Therefore, any cultural policy legislation would be viewed as far too rigid, and constrictive for many Americans to easily accept and adopt.

NEA Culture Wars Budget Cuts

The National Endowment for the Art's biggest setback presented itself in the form of drastic budget cuts that have followed many performing arts organizations into the 21st century. The NEA suddenly gained unwanted attention and notoriety during the "culture wars" of the late 1980s and early '90s (Shockley & McNeely, 2009, p. 8). Controversial artists such as Robert Mapplethorpe, Andres Serrano, and a group of four performance artists labeled the "NEA Four" created work that explored taboo social subjects like homosexuality and atheism which both offended and appalled many

conservatives. These well-mobilized far-right groups issued statements linking the NEA to the artists, and charged the federal agency with violating public decency and generating moral indignation (Shockley & McNeely, 2009, p. 8). After these charges were issued, the NEA was relentlessly scrutinized in its activities and was threatened with elimination by the primarily Republican Congress in the 1980s and 1990s, to which the Endowment was completely dependent upon for its budget and existence.

To avoid extinction, the NEA dramatically altered the way it administered federal support for the arts and modified its policy goals in three major ways. First, the agency increased its transparency by involving more lay citizens and members of Congress in grant-making decisions. Second, the Endowment, recognizing the freedom and autonomy the agency once had that now was gone, and the NEA leadership began to court all members of Congress including their Republican adversaries.

The third change, and by far the most controversial, was the programmatic restructuring of its grant-giving procedures. Historically, the Endowment would provide direct support to artists and artistic disciplines through individual grants, seasonal support, and sub grants. The monumental change meant that the NEA would no longer support artists, but move toward "arts-related" projects and organizations. While this would help, the NEA avoided being "vulnerable to charges of associate with another Mapplethorpe or Serrano", the elimination of these integral programs was "tantamount to a violation of the fundamental principles underlying the role of arts and artists in society" (Shockley & McNeely, 2009, p. 9-10).

Performing Arts in the Modern Era

After surviving the last few decades of the 20th century, the 21st century brought a series of challenges to light in the traditionally rooted performing arts. From the struggle to find adequate funding to seeking new audiences, performing arts organizations have faced a series of challenges and worked to create new opportunities for growth and learning by using technology to aid in the transition to the digital age.

To begin the process of understanding performing arts in the modern era, the RAND foundation 2001 report *The Performing Arts in a New Era* by McCarthy, Brooks, Lowell, & Zakaras provides an incredibly all-encompassing view into the detailed world of American performing arts system. At the start, they present their conceptual framework outlining their definition of the performing arts that ranges from traditional “high art” like music dance and theater to the popular arts found in mass media and pop-culture. They also identify the key dimensions of the performing arts system in their conceptual framework: art form; market sector; and the functional components or classes of people who serve key functions within the arts (artists, audiences, art organizations, and funders). After introducing their conceptual framework, the authors reflect on the arts as far back as the 19th century, but focus primarily on the expansion of the performing arts since 1970 and note that the current funding may not be sustainable.

Second, they delve into audiences and Americans' love for electronically reproduced substitutes of the arts, increasing premiums on flexibility in their leisure

activities, and the desire for more in-home entertainment. Third, they talk about American performing artists, whose numbers have been growing steadily over the past 20-30 years but risk of unemployment and underpayment is still low. Also, the presence of superstars continues to tilt the arts toward a select few performers with the invention of mass recording capabilities.

Fourth, they outline the function of performing arts organization in the growth of the sector. The number of these organizations and the constructing of performing arts venues have increased dramatically over the past 30 years, with many funded by development block grants; however, the sustainability of these houses is somewhat uncertain as the day-to-day operations may not be affordable to many performing groups. Fifth, the authors cover finances by splitting revenues into three main categories: earned income that has seen an increase since 1977; philanthropic contributions which have increased steadily over the past three decades; and direct government subsidies which account for only 5% of average revenues.

Finally, the authors offer a vision for the future, implications for the arts, and considerations for policy. Being that this was written in 2001, the predictions are not too far off from that of the current 2016 performing arts landscape. Large organizations rely increasingly on massive advertising and marketing campaigns, and seek to cater to broad versus niche markets. Small performing arts groups focus on low-budget, low-tech live productions that rely heavily on volunteer labor. At the end of their report, the authors suggest approaching new policies with "demand" strategies that will stimulate public involvement in the arts, rather than focusing on "supply" strategies as they have

done in the past.

Innovation to Combat Change

Effective change management is vital for performing arts organizations, and the biggest change in the past twenty years has been the decrease in audiences. Many factors have been accused of causing this decline: decrease in arts education funding of public schools; increase in “competing” activities; mass digitalization of art forms that can be enjoyed at home; decrease in funding for the arts leading to lower accessibility in communities. Whatever the cause, audience numbers are dwindling and selling tickets is proving to be a monumental challenge.

However, the following case studies provide excellent examples of the innovation in the traditional change resistance performing arts sector that worked to combat the external challenges faced by so many. Whether it be assembling a best practice for participation or changing how performances are talked about or conducted helps organizations break free from long held ideas of the “right way” to perform art and pave the way for innovation in the arts that will allow for further access to fine art.

Best Practices for Building Participation

To investigate this challenge facing arts organizations in the 21st century, Bob Harlow wrote an article in response to a RAND foundation study from 15 years earlier called *A New Framework for Building Participation in the Arts*. In his 2014 study, Harlow

answered two of the remaining questions from the RAND study to develop and expand audiences: could this approach work in practice; if yes, how could organization implement it? Between 2006 and 2012, the Wallace Foundation funded 54 organizations to develop and test approaches for expanding audiences informed by RAND's guidance. Among 46 of the organizations with reliable data, the results were positive. Bob Harlow had the unique task of looking closely at 10 of the 54, writing a case study evaluation for each, and identifying nine practices they share:

1. Recognizing when change is needed, and not being afraid to pursue that change even if it is a new or foreign concept.
2. Identifying the target audience that fits through careful thought, consideration, and sector research.
3. Determining what kinds of barriers need to be removed to allow for growth.
4. Taking out the guesswork by performing audience research to clarify a programming approach.
5. Thinking through the relationship that they wanted to build with their new audience.
6. Providing multiple ways in to expand access to their organization both literally and psychologically.
7. Aligning the organization around the strategy with leaders and staff building clarity, consensus, and internal buy-in around the audience-building techniques which helped with implementation.

8. Building in learning by allowing for the stops, starts, and failures to propel them toward starting again and creating something new despite the setback.
9. All ten of the organizations prepared well for success in their ventures by also following the other 8 steps to success.

By gathering the key moves from each organization, Harlow created a “best practices” outline for performing arts organizations around the United States to follow.

An excellent example of Harlow's 9 practices of successful change management principles in performing arts organizations is the Steppenwolf Theatre Company of Chicago, IL. Coupled with a new database software and careful selection of skilled, impactful leaders, Steppenwolf has proven to be on the cutting edge of success. Rather than fading into obscurity, the company made a bold move to build a new, expensive facility and make a “deliberate effort to institutionalize itself” (Ravanas, 2006, p. 66). This institutionalization involved recruiting board members with means to support the organization, and moving from “communal self-governance to a more defined organizational structure” (Ravanas, 2006, p. 66). The organizational structure of Steppenwolf starts with the board of directors at the top, and the artistic and executive director sharing company leadership. The artistic director has always been drawn from the ensemble members and mentored by the board to ensure artistic continuity. The executive director, however, was recruited to the organization with many years of managerial experience. Each director spearheads different portions and departments of the organization: artistic oversees programming, artist management, directing, and show production; the executive side manages the box office, finance, HR, fundraising,

and marketing. Both directors share a role in guaranteeing Steppenwolf's artistic freedom (Ravanas, 2006, p. 67).

The case study further divulges Steppenwolf's exemplary management models that allow the company to thrive. The theater relies on two main sources of income: donations and ticket sales. This is thanks to the company's efforts to build audience relations and schedule programming that is both engaging and progressive. Steppenwolf also takes full advantage of the software program Tessitura to do everything from ticket sales, donation tracking, and marketing analysis.

The case study concludes with Steppenwolf's challenge of aging audiences and diminishing subscription base- a widespread problem among American performing arts organizations. Based on the commentary in the case study, Steppenwolf's executives seem to be very aware of the problem and are actively looking for ways to combat this change in demographic. Confident in their product, Steppenwolf is offering a variety of programming to engage younger audiences and offering tickets to certain shows at deep discount. The idea is not to break even with a \$15 black-box ticket, but cultivate a future patron who at this life stage can only afford the cheapest seat but may eventually grow into a lifelong member. By offering a wide array of intriguing plays at a lower price, Steppenwolf is taking steps to actively diversify their audience and increase accessibility to their community.

Pursing Younger Audiences

The Boston Lyric Opera watched opera audiences plummet to their lowest recorded rate of 8.3% in 2008, and wanted to include a younger generation in their programming before the preconceived notion of the stuffy-ness of opera had a chance to take hold in children's minds. So, the company began creating more family friendly performances by first removing the barriers and obstacles that prevent parents from seeing opera like high ticket prices, and the idea of opera as traditionalist. Second, the company had to find the venues that would allow families to enjoy the opera were also located near opera fans that could attend. Third, was marketing opera to both familiar and unfamiliar audiences using the website to educate, promote, and sell the family friendly performances. The results of the creation of family friendly performances did just what they wanted- increased the audience size and allowed opera fans and their children to go. However, very few of the adult attendees became main stage patrons (Harlow et al, 2011, p. 33-42).

Another program Boston Lyric enacted was the preview program that was initially designed to serve as lecture-recital hybrids but eventually evolved into educational troupes that performed at public libraries and schools to promote the upcoming show. The program results were good and were found to be more effective at increasing adult participation than the family oriented shows. The preview program also allowed Boston Lyric to find an effective community partner in public libraries, as well as convey the essence of opera in a comfortable format while also addressing practical and perceptual barriers (Harlow et al, 2011, p. 43-50).

The Use of Technology

Technology is an incredibly important part of staying relevant in today's digitally based society, and in connecting with the masses. Seattle Opera saw the opportunity to use new marketing techniques to connect patrons with the organization and the performances they produced. In 2008, Seattle opera created a task force to oversee new media and technology strategies that would encourage audience members, new and old, to engage in opera performances. To do this they created three promising applications that they would use over a four-year period with different productions meant to create viral communities about opera, provide a place to learn more, and engage audiences outside of the opera hall (Harlow, 2015, p. 5-14).

In year 1, Seattle Opera premiered Wagner's Ring cycle with accompanying behind-the-scenes video series, an interactive website, and pre-performance podcasts. Because many of the Ring patrons were older, skeptics didn't think the use of interactive technology was worthwhile and many performers felt uncomfortable with showing a less than perfect product on camera while making the video series. However, all their efforts were extremely popular and enhanced the audience experience (Harlow, 2015, p. 15-30). Year 2 focused on the new work, *Amelia*, about a young girl's history with war-time aviation. Audience research quickly showed that more education and background on the opera was needed, because Amelia had nothing to do with the famous aviation heroine Amelia Earhart. So, the company created a series of podcasts, curated an accompanying exhibit in the opera house lobby, and made videos and marketing materials that worked to both promote and educate. The

technology efforts with Amelia were not as productive or successful as with the Ring Cycle, but Seattle Opera kept moving forward (Harlow, 2015, p. 34-40).

In year 3, Seattle Opera began to introduce touchscreen tables in the lobby and worked with Kindle on creating a "Spotlight Guide" that could be read on an individual device (Harlow, 2015, p 45-48). In year 4, the company made a big move to simulcast their production of *Madame Butterfly* Seattle's Key Arena, an enclosed stadium used for a variety of sporting events. The simulcast was attended by a crowd of 5,126, with 27% of those people being newcomers to Seattle Opera's work. These people were young and look for something "unique and different" to do with their Saturday night. The results from the simulcast were high-impact and encouraging, but the whole production was a very expensive way to reach a new audience (Harlow, 2015, p. 67-68). Seattle Opera did find, however, that the key to successfully using technology was to focus on learning and decreasing the barriers to understanding before the patron walked into the auditorium to see the performance. The company also found that involving the broader organization early in the planning process is an important move to ensure all facets of the organization understand the technology and how it affects the mission of the organization (Harlow, 2015, p. 70-76).

Marketing through Traditional Channels

Technology, however, does not have to be the driving force in creating creative marketing techniques to attract a new audience demographic. Minnesota Opera, through smart community partnerships, is an excellent example of this. Through a

serendipitous chain of events and the help of a local talk-radio host, the Minnesota Opera has set out to dispel the old preconceived notions of opera being stuffy and elitist. An opera buff himself, Ian Punnett and radio station myTalk 107.1 has helped raise season ticket subscribers and new single ticket buyers dramatically in the four seasons of partnership (Harlow & Roman, 2014, p.5-9).

Happening almost by chance, Willis (the Director of Marketing) got the idea for a partnership when Punnett's wife asked for one of the company's opera singers to sing "Happy Birthday" to him on his daily show. With an obscure German baroque opera, due to open later that month and dismal ticket sales, Willis offered free seats to the talk-show host and to a select few of his listeners. Expecting to only fill 50 seats, callers jammed the lines and filled 500 seats in two hours, putting the Ordway Performance Center at 91% capacity. After such a fantastic turn out, Willis and her team began researching the demographic of Punnett's morning talk show and found that 70% were educated women between ages 35 and 65- the same demographic the opera had been trying to reach (Harlow & Roman, 2014, p. 9-15).

Through a carefully crafted partnership plan, Minnesota Opera began to expand their promotional efforts into local radio/TV using live endorsements, prerecorded commercials, ticket giveaways, opera insights, artist interviews, a partnership with KSTP-TV, as well as creating a partnership budget. The results showed Punnett's talk show listeners redeeming at high rates and has increased the number of middle-aged women active in Minnesota Opera, but turning complimentary ticket receivers into paying ticket buyers is a very slow process. This study has shown the true

value of a trusted endorser who serves as both a promotional tool, and as a credible source regarding the art form making people more likely to dispel their preconceived notions about opera and persuade them to try it. However, this case study also highlighted the long road from free ticket holders to ticket buyers as the slow, sometimes frustrating process, it is for many performing art organizations around the country because new audiences are often unsure of what they want coupled with the psychological barriers of “free” (Harlow & Roman, 2014, p. 34-42).

Chapter Summary

In summary, this chapter frames the current challenges of the performing arts sector through the funding struggles of American arts sector since the inception of the National Endowment for the Arts to its state in modern society. External factors notwithstanding, many organizations have begun to develop and experiment with innovative programs to form a set of best practices for audience engagement. The upcoming chapter, will focus in more detail on the history of the American sector and how programming has historically been tied to a change resistant mentality in the opera field that has been detrimental to audience numbers since the turn of the century.

Chapter 3 – A Historical Overview of American Opera

This chapter presents a historical overview of the development of opera in the United States focusing on the performing troupes, institutions, and venues that have shaped the modern opera landscape. The beginnings of American opera will be explored in detail, as well as the Metropolitan Opera in New York City that helped establish the art form in the late 19th century. Focus will be placed on the history of leading opera companies of the 20th century regions of the United States. To accompany the historical overview, a review of various case studies suggesting programming stagnation in opera companies during the latter half of the 20th century and into the 21st century will be examined.

For the purposes of this chapter, and for the following research project, “American Opera” will be defined as opera performed within the modern boundaries of the United States of America. “Opera” will keep its traditional definition of a dramatic work combining text and musical score in a theatrical setting, performed by singers and musicians.

Opera in the 19th Century

In the first half of the 19th century, traveling operatic troupes were a vital part of American theater. Performances of many kinds of opera (in French, Italian, English, and

to a limited extent—German) attracted American audiences of all social and economic classes (Preston, 2003). Two types of stock company began to emerge: one had a base in one or more cities and traveled a given route during a year; the other had no base but went wherever there was the possibility of an audience (Mates, 1994, p. 34). These troupes were often divided by language, with French troupes traveling New Orleans and the south, the Italians touring the Northeast, and English language troupes touring the whole of the United States. What they all had in common was their dependence on comic operas, and their steadfast early managers leading shaping repertoire not only to attract audiences but laying the groundwork for opera for years to come (Mates, 1994).

By far the most popular troupes were the English-language troupes. “Americans consumed their opera readily and happily” (Preston, 2003, p. 350), with most of the standard repertory consisting of works written in or translated to English. There was little sense during most of the first fifty years of opera in America that opera in translation was in any way inferior to opera in the original language (Preston, 2003). The simplest explanation being that English-language opera could be understood and enjoyed by the average American. English language opera, accessible to the broadest population and appealing by its strategically interwoven folk songs, was the accepted repertory which consistently dominated into the 1840s (Ottenberg, 1994, p. 48). Opera, as an art form, fit easily into the broad and constantly changing theatrical repertory that included melodrama, ballet, burlesque, magic, and the like (Preston, 2003).

While many English-language troupes began forming as early as 1859, many troupes toured widely and for long periods of time, sometimes for a decade or more, to

attract large audiences in non-metropolitan areas (Preston, 2003), and ventured into the “wild west” of the United States following the Civil War. American soprano, Emma Abbott, founded an English-language company in 1878 that toured for thirteen consecutive years all over North America including some cities as far west as Denver and Utah. Before Abbott's untimely death in Salt Lake City, her company is repudiated to have opened some thirty-five different opera houses, primarily in the American West (Preston, 2003).

Most English-language troupes were created, led, and curated by American and English sopranos. The troupes were often named after their lead “prima donna,” who wielded significant managerial or artistic control over their troupes (Preston, 2003). Many of these women were often marginalized and struggled to have a career with foreign-language companies due to their lack of “exotic” appeal. Those that did reach some level of stardom had to first change their name to a to fabricate a more European façade. Many troupes set out to create an image of English opera that was in stark contrast to that projected by European-centric companies (Preston, 2003). Playbills from Clara Kellogg's Grand English Opera Company would proudly proclaim “opera for the people” (Preston, 2003). The westward bound soprano, Emma Abbott, was known fondly as “the people's prima donna.” Due to her contributions to traveling opera troupes, scores of new opera houses in the far west were opened and thousands were introduced to the musical-theatrical form along the way (Preston, 2003).

Despite the very lively and keen interest in English-language opera in the late nineteenth century, there are very few secondary sources on popular American opera

at the time. One reason for the lack of research could be the late-nineteenth-century musical press was mesmerized by the glitterati of the Italian opera world of Verdi, Puccini, and later the German Wagner. Another could be the stark contrast in repertory performed in English-language troupes versus standard European-based repertory. Collections of theatrical playbills, lists of repertoires performed during the seasons, even scrapbooks full of playbills and ticket stubs all clearly indicate a heterogeneous repertory (Preston, 2003). No matter the reason, English-language opera played a vital role in the evolution of American popular theater.

A Brief History of the Metropolitan Opera

During the same period that many opera troupes were forming in the more rural parts of the American frontier, opera began to emerge as an institutionalized art form in more urban areas. In the late part of the nineteenth century “foreign-language opera—especially in Italian (but later in German)—gradually became the dominant style in terms of reputation, allure, and fashion” (Preston, 2003). The “fashionable” image of Italian opera was cultivated by wealthy citizens of East Coast cities (Preston, 2003, p. 350).” The reigning institution to encourage and cement this fascination in the hearts and minds of the American elite was the Metropolitan Opera in New York City.

Founded in 1880 as an alternative to the Academy of Music, the first benefactors included Morgan, Roosevelt, Astor, and Vanderbilt, who came to see the opera but also be seen themselves (Ravanas, 2007). On 22 October 1883, the Metropolitan Opera

was inaugurated with a performance of Charles Gounod's *Faust* (Pennino, 2000), and began its infamous reign as the leading institution for American opera.

In its 134-year history, the Metropolitan Opera (today more commonly referred to as the MET Opera) has become the largest classical music organization in North America and has cultivated the standard of operatic repertoire and performance in the United States. The company still exists today and is considered the pinnacle of traditional operatic artistry and is the United States' largest opera company.

The Metropolitan Opera, being such an icon, has inspired many arts leaders to open opera companies across the country and even in their own backyard. The New York City Opera, founded in 1943 to offer rage against the institutional, if not slightly rigid, Metropolitan Opera, was often referred to as the "people's opera" and often competed with the long-reigning MET Opera for opera audiences. Performing in the New York State Theater at Lincoln Center, the company's stated purpose was to make opera accessible to a wide audience at a reasonable ticket price. Perhaps New York City Opera's most endearing qualities is its commitment to producing an innovative choice of repertory. The New York City Opera has championed the work of American composers and has interspersed American repertoire, established and new, into their seasons. This is in sharp contrast to the Metropolitan opera, who has been criticized for decades on the "fossilized" nature programming (Martorella, 1977) that has emphasized the popular European classics over 20th century works.

Plagued by financial woes, the New York City Opera filed for Chapter 11 bankruptcy in October 2013 after decades of unbalanced budgets and a controversial

move from Lincoln Center. The company's bankruptcy sent shock waves through the American opera sector, evoking feelings of shock that one of New York City's large operatic institutions could be felled by the same challenges faced by companies nationwide. In 2016, the company was revived after being approved by bankruptcy court to do so.

Part of the MET Opera's long reigning success is its incredible foresight into the needs of the opera sector, and has lead the charge in the 21st century of incorporating technology into intuitional functions. In 2006, the company embarked on the project *MET Opera: Live in HD* to build a different revenue stream and reach new audiences. The MET Opera's most notable contribution to the advancement of American opera is its multifunctional database software Tessitura.

After years of artistic achievements, technical prowess, and audience acclaim, little attention had been paid to marketing, box office management or customer relations. Even as late as 1993, the MET Opera didn't have an automated box office and had no way of tracking financial transactions or customer complaints. After a study of the MET Opera's inner workings and software scouting, it was soon discovered that there was not a single platform suitable to simultaneously perform the functions the company needed most in one flawless system: box office and ticket management; marketing/promotional data and output tracking; development and fundraising management. The new, revolutionary software was the brainchild of stage manager, turned information and technology specialist, Chuck Reif, and was named Tessitura: a term for the median pitch of a musical range (Ravanas, 2007). It was the crowning achievement of a four-year, \$5-million effort that included not only the development of

an ambitious computer program but also management transformations necessitating changes in labor agreements and extensive training efforts (Ravanas, 2007).

Successful launching and usage of Tessitura in late 1999 and early 2000 led to other companies around the country begging to use the software. Many companies had been spurned by software producers who promised an updated software, but ended up selling to a larger company and stopping support their CRM. This often led to precarious financial situations as donations were not efficiently tracked and payroll derailed, as well as internal turmoil when staff had to re-train on the new technology systems that were phased in and out every few years. The MET Opera's Tessitura is a different breed, being a nonprofit and being invested in its performing arts software system. Unlike most software vendors, the MET Opera was using its own system and had obvious interest in maintaining it (Ravanas, 2007). Many executives at the MET Opera realized that they could do well by doing good: if it licensed Tessitura, it would not only recoup part of its investment but also spread good management practices, benefiting the entire performing arts field. Many of the first licensees- the Kennedy Center, the Lyric Opera of Chicago, the New York City Center for the Performing Arts, the San Francisco Symphony, the Santa Fe Opera and the Seattle Opera—still use Tessitura almost ten years later. Many more organizations have incorporated Tessitura into their management and strategic plans, and the software has become an industry standard for performing arts organizations across the country.

Programming in American Opera Companies in the Late 20th Century

The American opera industry has seen dramatic growth over the past 30-40 years, with the number of professional opera companies almost doubling from the 1980s to the 1990s (Heilbrun, 2001). With the availability and accessibility of opera at an all-time high for far more communities in the United States, the same challenges facing the performing arts sector began to burden the opera industry with financial woes and low attendance. This creates significant strain on a sector that “do not exist solely for the purpose of satisfying consumer demand, but to also further their musical medium” (Pierce, 2000, p. 46).

American opera, unlike most art, has not seen the benefits and “artistic innovations ... with increased middle class patronage” (Martorella, 1977, pg. 356) that is necessary in new regions of the country that need more cultivation to be opera patrons. Newer, younger companies will often produce an unusually high proportion of old favorites during their early years, when they are struggling to become established (Heilbrun, 2001, p. 69). In Heilbrun's study “Empirical Evidence of a Decline in Repertory Diversity among American Opera Companies 1991/92 to 1997/98,” delves deeper into the decrease in repertoire diversity by using the Herfindahl Index “to measure the degree of concentration of the aggregate opera repertory each year” (Heilbrun, 2001, p. 69). His data reflects the most popular operas of the last three decades holding a high number of productions: *La Bohème* (Puccini), *La Traviata* (Verdi), *Barber of Seville* (Rossini), *Marriage of Figaro* (Mozart), and *Carmen* (Bizet). Some of the most produced operas

fade in and out with the decade like *Pagliacci* (Leoncavallo), most likely made popular by Pavarotti's famous performance, and *Rigoletto* (Verdi) in the 1980s or *Madame Butterfly* (Puccini) in the late 1990s. overall, however, the pattern displayed an overall decline in diversity since 1991/92, and the Herfindahl index of repertory concentration rose indicating an increasing reliance on the most popular productions (Heilbrun, 2001, p. 68). Among his possible explanations for his findings, Heilbrun suggests that budgetary pressure developing in the 1990s might explain the decline in diversity. Heilbrun concludes that many opera companies have "been shifting their programming toward more popular, less demanding repertory. Presumably this is done to ward off financial trouble" (Heilbrun, 2001, p. 71).

Due to the lack of federal arts funding, more and more opera companies are reliant on private patronage to continue singing. Pierce, in his 2000 study entitled "Programmatic Risk-Taking by American Opera Companies", argues that increased reliance on private donations decreases the programmatic risk many companies can take due to the enormous control donors have over opera companies. "If these donors dislike new and unusual works, which is often the case, opera companies would be acting rationally to offer conventional programs" (Pierce, 2000, p.46). Assuming his hypothesis to be correct, a stagnant and risk adverse organization that focuses far too much on eighteenth, nineteenth, and early twentieth century canon to appease donors is created. Pierce also argues that government support and liberal, educated communities would allow greater experimentation with new or lesser-known repertoire.

Using complete programming data from Opera American for all its members from 1989 through 1994, Pierce could assess the risk level for a company's program by assigning a numerical value to each opera equal to the number of production offered in the five-year period. Pierce also assigns variables to certain determinants like conventionality, conservatism, inflexibility, sophistication, income, and private/government grant making institutions. Pierce concludes that opera companies in cities with more conservative populations tend to produce lower-risk operas. Most importantly, however, it was proven that the higher financial involvement of individual donors does not tend to lower risk in programming (Pierce, 2000, p. 59).

Programming is also very much affected by the need to increase box office sales and increase audience size. In large opera houses, "popular operas will be selected for presentation and superstars will be cast in major roles" (Martorella, 1977, p. 358), leaving little room for contemporary work to flourish. In Kim and Jensen's 2011 study "How Product Order Affects Market Identity: Repertoire Ordering in the U.S. Opera Market", the authors looked into Season-Ticket Audience Variables from 1995-2005 to determine if two hypotheses were true: 1.) when opera companies group unconventional operas together, their market appeal decreases among season-ticket holders; 2.) more diverse season programming increased ticket purchases among opera critics, an audience for whom unconventional opera is more appealing (p. 241). At the end of their research, Kim and Jensen found that season ticket holders were influenced positively by the interspersed ordering of unconventional operas in their repertoire. However, it was also found that opera critics were less likely to cover opera performances by opera companies with interspersed repertoires. These findings emphasize the importance of

ordering to redefine market identities. It also encourages opera companies to not be too risk adverse with their programming decisions, as diverse programming often has a positive effect on the box office.

As opera evolved from a traveling troupe of performers to a more institutionalized art form, the repertoire that was produced and presented to the public began to transform. The move from English-language opera to European classics made opera focus much more on its past rather than its present. Opera leaders did not anticipate a day when opera would no longer be valuable because of the music, story, or status it held, and many still struggle today in finding a way to engage with the community they wish to entertain. The next chapter focuses on the types of repertoire produced by many of today's leading opera companies, and how it is meant to tackle the external factors facing opera companies today.

Chapter 4- Collective Case Study

Introduction

To further explore the development of modern opera repertoire programming, and the effects season programming has on all internal and external aspects of the organization, this research study utilized a collective case study of three major opera companies on the west coast. The opera companies studied were San Francisco Opera, Portland Opera, and Seattle Opera. Each organization was chosen due to its geographic location, and the relative size of each company, with each annual budget between \$8 and 15 million. All three organizations share certain similarities regarding the type of repertoire and programming presented each season; however, each company offers a distinctly unique view on exactly how and when their programming is chosen and presented.

The study looked at the season programming process of large opera companies, the internal personnel involved, the external effects of the programming, as well as the challenges and opportunities for each company. Information was collected via interviews with a select few of key administrative staff at each site. Due to the difficulty in contacting and connecting to main personnel who were a part of the programming process, only five people were interviewed across the three case study sites. Nonetheless, a significant amount of information was collected regarding the programming processes of each organization from the informants that participated in phone and in-person interviews.

The following chapter contains a comparative analysis of programming from other leading opera companies of similar sizes to San Francisco Opera, Portland Opera, and Seattle Opera. This analysis will help frame the case study analysis by comparing national repertoire and programming trends, as well as the differences and similarities found in each case study site. After analyzing national programming trends in opera companies, the collective case study with all three case study sites will be elaborated upon. For each case study site, an overview of the company will be presented and the informant interviews will be reviewed with specific findings elaborated on.

National Opera Company Comparison Analysis

To combat the decrease in operatic audiences nationwide, leading American opera companies have a unique set of opportunities and challenges before them in presenting opera to the modern public. The challenges among opera companies are shared with their peers in other performing arts disciplines like small audience numbers and low ticket sales; however, coupling these sector wide challenges with opera's incredibly expensive production costs leads to further gaps in the balance sheets and often uncertain financial futures for even the most established houses.

Luckily, the opportunities for leading opera companies can be found in the repertoire of opera itself, and successful seasons can be achieved with timely, well-balanced programming decisions that resonate with each company's unique audience. To showcase the use of programming as a positioning strategy for increased

participation and attendance, I chose five leading opera companies of the United States for further research that matched the sizes of the following collective case study analysis of San Francisco Opera, Portland Opera, and Seattle Opera.

For the purposes of this paper, "leading opera companies" can be defined as opera companies with budgets over \$15 million, based on Opera America's 2016 Annual Field Report. The five companies are as follows: The Dallas Opera; Houston Grand Opera; Lyric Opera of Chicago; Los Angeles Opera; The Santa Fe Opera.

The Dallas Opera

Since 2005 the Dallas Opera has advertised and planned repertoire according to a specific theme, ranging from "Death by Diva" featuring works by Puccini, Verdi, and Strauss to "Seeking the Human Element" with two of their five shows begin newly commissioned works. The 2016-2017 season hosted a rather large season of 5 shows, all rather large operas: *Norma* by Bellini, *Eugene Onegin* by Tchaikovsky, *Moby-Dick* by Heggie & Scheer, *Madame Butterfly* by Puccini, and the *Turn of the Screw* by Britten. The coming 2017-2018 season will present *Samson & Dalila* by Saint-Saens, *La Traviata* by Verdi, *The Ring of Polykrates* by Korngold (a relatively unknown German opera by a composer that has gained significant popularity in the 21st century), *Sunken Garden* by van der Aa, and *Don Giovanni* by Mozart.

The Dallas Opera has gained national recognition for their recent commitment to commissioning, producing, and performing new works by some of opera's most popular modern composers like Jake Heggie, Mark Adamo, and Dominick Argento.

While reviews have been mixed regarding these new commissions, the company is making great strides in promoting the development of modern opera through frequent commissions and performances. The Dallas Opera, based on their previous seasons, does perform a considerable number of English language operas each year most likely to lower the barrier of entry for opera goers that are less familiar with the art form.

Houston Grand Opera

Committed to high quality opera on a massive scale, the Houston Grand Opera is also gaining nationwide credibility as focus moves from the "star-driven" houses of each coast and on to innovation in the sector. The 2016-2017 season presented Donizetti's *Elixir of Love*, Gounod's *Faust*, Heggie's *It's a Wonderful Life*, Adams' *Nixon In China*, a concert performance of Verdi's *Requiem*, the finale of Wagner's Ring Cycle *Götterdämmerung*, and Mozart's *The Abduction from Seraglio*.

Houston Grand Opera, like their Dallas neighbor to the north, has commissioned and premiered several new works in recent years. December of 2016 saw the premiere of *It's a Wonderful Life* by Heggie, a holiday opera, soon after Dallas Opera premiered *Becoming Santa Claus* by Adamo in December of 2015. Fans of the opera found the music compelling and the story-line cheerful. Critics, which were numerous, accused the company of trying to force a *Nutcracker*-esque piece, or a Christmas-time staple guaranteed to increase revenue and audiences once a year, on opera audiences. It can be argued, however, that opera too can benefit from a seasonal staple that revels

in the happiness of the holiday season, sells a healthy number of tickets, and entertains a new audience demographic.

Lyric Opera of Chicago

The Lyric Opera of Chicago, also referred to as the Lyric, was founded in 1954 by a group of operatic stars, and to this day remains one major opera companies in the United States. Housed in the historic Civic Opera House built in 1929 (Zietz, 1996, p. 98), the Lyric has contributed to Chicago's informal nickname of the "Second City", as the performing arts scene of the large, Midwestern lake town is often compared to New York City. Launching the careers of various singers and conductors, the Lyric has worked to diversify their programming and provide extensive outreach to Chicago areas lacking accessible opera (Lyric Opera, 2016). The Lyric relies very heavily on its prestige and high-budget production budget to create metropolitan worthy performances. That is not to say, however, that their season programming is not well-balanced with a wide array of operatic genres, languages, and performance types.

On the 2016-2017 mainstage, the Lyric presented *My Fair Lady* by Lerner and Loewe, *Das Rheingold* by Wagner, *Lucia Di Lammermoor* by Donizetti, *Les Troyens* by Berlioz, *Don Quichotte* by Massenet, *The Magic Flute* by Mozart, *Norma* by Bellini, *Eugene Onegin* by Tchaikovsky, and *Carmen* by Bizet. To accompany their mainstage shows, the Lyric also hosts small concerts to compliment the season and fill gaps between performances. In 2016, the Lyric joined forces with The Second City improv troupe to create a hilarious Wagner Companion, hosted An Afternoon of Chamber Music inspired by the mainstage season, and produced Charlie Parker's *Yardbird- A*

Chamber Opera. The Lyric also features solo artist concerts with stars like Placido Domingo, Lawrence Brownlee, Eric Owens, and Itzhak Perlman, the “reigning virtuoso of the violin” (The Lyric Opera, 2017).

The Santa Fe Opera

Located in the American Southwest, The Santa Fe Opera is different from the opera companies listed in this report and across the nation. It is the largest summer opera festival on the continent, with all its productions performed in the summer months, and hosts fantastic views of the mountains from their open-air theater. In four short months, the company produces and performs five operas that run for the entire season, to allow weekend opera attendees to see all five shows in a three-day span.

Much like many other leading opera companies, The Santa Fe Opera is committed to premiering one new work each season. The 2017 season's world premier is *The (R) Evolution of Steve Jobs* composed by Mason Bates and libretto written by Mark Campbell. The opera focuses on infamous creator of Apple Computers, Steve Jobs, and his late-life search for his inner truth after leading a “binary life- magnetic and unapproachable, empathetic and cruel, meditative and restless” (Santa Fe Opera, 2017). Anticipation is building for the summer show, thanks in large part, to the highly successful *Cold Mountain* premiered in 2015. Co-commissioned and co-produced by The Santa Fe Opera, Opera Philadelphia, Minnesota Opera, and North Carolina Opera, the work is based on Charles Frazier's 1997 historical novel of the same name.

Composed by Jennifer Higdon and libretto by Gene Scheer, *Cold Mountain* has received a vast number of awards and two Grammy nominations.

Los Angeles Opera

With the veteran tenor turned baritone, Placido Domingo, at the helm as the General Director, Los Angeles Opera is committed to “producing world-class opera that preserves, promotes and advances the art form.” Many of Los Angeles Opera's productions are works composed within the last 50 years, if not the last 20, and span a large breadth of genre, style, and subject matter. Many of 2016-2017 titles are very scarcely performed operas or world-premieres, which speaks to Los Angeles Opera's innovation in using the opera genre to create new conversations in the American performing arts sector.

The 2016-2017 season presents Verdi's *MacBeth*, Glass' *Akhaten*, Mozart's *The Abduction from The Seraglio*, Strauss' *Salome*, Offenbach's *The Tales of Hoffmann*, Puccini's *Tosca*, Bernstein's *Wonderful Town*, and Sankaram's *Thumbprint*. To accompany the mainstage performances, the Los Angeles Opera has produced two mixed-media projects: the first, is the re-scoring of the 1922 silent film *Nosferatu* by LA Opera's Matthew Aucoin due to the loss of original film score; the second is a production with film, 4 singers, and audio playback entitled *The Source*, based on Chelsea Manning's leak of hundreds of thousand classified documents. LA Opera is also hosting Anna Netrebko and Yusif Eyvazov, as well as their own Placido Domingo, in concert.

This comparative analysis offers valuable insight on the recent national trends in repertoire programming in leading opera companies. While each company has a unique brand, and a different definition of “opera canon,” the European classics are presented more often than new works. However, despite including many popular operas, all five companies have produced an opera composed in in the 21st century. It is incredibly important to note the drive for more modern or relevant opera in so many of the United States’ leading institutions, and ultimately link timely story-telling with current issues. Looking forward to my collective case study analysis of Portland Opera, Seattle Opera, and San Francisco Opera, I examined the programming processes to gage their innovation in repertoire selection.

Collective Case Study Analysis

Portland Opera

Overview

Founded in 1964 by conductor Henry Holt, Portland Opera Association Inc. is the 12th largest opera company in the United States (Rivera, 2014) and is based at the Hampton Opera Center in Portland, Oregon. Portland Opera Association Inc. (most commonly known as Portland Opera) was one of the first opera companies to introduce surtitles, translated lyrics projected above the stage or displayed on screen, in its performances. Portland Opera’s mission statement, adopted by the board in January 2005, incorporates the organization’s vision for the future and remains relevant

to the company's current goals and circumstances: "Portland Opera exists to inspire, challenge and uplift our audiences by creating productions of high artistic quality that celebrate the beauty and breadth of opera" (Portland Opera, 2017).

With Seattle Opera to the north and San Francisco Opera to the far south, Portland Opera has provided a "service delivery" (Frumkin, 2002, p. 25) of opera to Pacific Northwest audience members of Oregon and southern Washington. It has also filled an artistic gap due to market failure in Oregon's most populated city (Frumkin, 2002, p. 25). The organization's main programs are their opera education and community outreach programs, Portland Opera's Broadway Across America Season, and the mainstage opera season (Portland Opera, 2016).

The most meaningful change to Portland Opera's recent programming and activity involves the mainstage opera season. Historically, Portland Opera has hosted performances from October thru May like many other performing arts organizations nationwide. However, in the fall of 2014, Portland Opera announced their plan to shift their performance season from the traditional seven-month structure to a compressed, 12-week summer festival model (Stabler, 2014). While Portland Opera has historically done an adequate job of managing their money, the change in season structure was meant to stabilize the company's fluctuating finances; in addition, the change was an attempt to adapt to a new set of circumstances facing American opera companies. With the dramatic closure of the famous New York City Opera in 2014 and the Metropolitan Opera's frequent deficit challenges (Rivera, 2014), many American opera companies began taking a serious look at their futures.

To "...be proactive... and [avoid] death by a thousand paper cuts" (Stabler, 2014), Portland Opera's General Director Christopher Mattaliano wanted to adjust the company's operation to avoid future struggles. With the change to a summer festival model, the company estimated saving \$400,000 to \$500,000 (about 8% of the budget) due to lower costs of operation in smaller, more opera-appropriate theaters and fewer mainstage productions over the course of the year.

Data Collection

To gain further insight on Portland Opera's repertoire planning, I sat down with Christopher Mattaliano, Portland Opera's General Director for an interview on March 29, 2017. Following a "classic" structure, Mattaliano fills the position of both the artistic and executive director in his current position, and sits just below the Board of Directors on the organizational chart. In addition to overseeing all administrative functions, Mattaliano alone holds full programming decision making with very little help from other members of the organization.

Thinking three to five years into the future, Mattaliano will start sketching up possible repertoire selections for the coming seasons. With the help of his Head of Production and Head of Artistic Operations, Mattaliano will begin to piece together a budget that includes production prices, casting calls, and general production expenses. The Marketing Director also contributes by creating a mock marketing plan, complete with expenses, based on the unofficial programming selection. With all this work in hand, Mattaliano presents an operating budget to the Board of Director each October for the performance season two years out.

When asked just how he chooses the exact opera's he will perform each season, Mattaliano responded with "There's a lot that goes into it." Often the General Director, sticks to the "seven-year rule" that doesn't allow the re-performance of any opera until a full seven years has elapsed. The venue also dictates what sort of show Portland Opera will showcase, with large crowd-pleasers performing in the 3,000 seat Keller Auditorium where tickets will easily sell and more unknown works featured in the small theaters, where the company will take less of a financial hit. Looking at the larger whole, Mattaliano likes to follow a very basic programming model when choosing repertoire for upcoming seasons. He chooses two popular shows for performance in the Keller, one with a well-known composer but unknown opera, the other an unfamiliar title with a wide operatic following. The third is what Mattaliano defines as a "stretch piece," defined as a relatively unknown work but that fits in with the rest of the season and will resonate with the Portland community. The fourth piece Mattaliano includes in each of his seasons is almost always some sort of Mozart or *bel canto* opera.

Supporting Chris Mattaliano in his programming decisions, is Clare Burovac the Director of Artistic Operations, one of five managing directors, at the Portland Opera. Burovac manages much of the auditions and casting of the Portland Opera season, and offered valuable insight on the internal and external factors of producing opera in an interview on March 29, 2017. Mattaliano, along with the whole of Portland Opera, do not let national programming trends drive the company's repertoire decision making. With various forms of new works and non-traditional productions of classic titles appearing on opera stages across the country, Burovac insists that all of Portland Opera's shows must have Mattaliano's stamp of approval and be of good artistic

quality before the company will include the show in their season. Standing by their artistic integrity, Burovac also maintains that Portland Opera always stands by their repertoire and production decisions, even when the critical review may not be good.

As for the various administrative departments contributing to season programming, Burovac maintains that the final word rests with Mattaliano with the season repertoire driving much of the marketing, fundraising, and educational programming. While marketing would always like to see a ticket-selling *La Bohème*, due to the opera's national popularity, the department is always open to something interesting and popular that their audiences will enjoy. The Development department brings grant ideas to Mattaliano from funding projects in the Portland area, and works to match Portland Opera's mission and programming to the wide variety of grants available in the Portland Metro area and beyond.

One of Burovac's newest outreach programs, is Portland "Opera a la Cart", which was inspired by Portland's food cart culture. The new mobile performance venue, designed by architecture students at Portland State University, brings opera directly to the community in pop-up performances at farmer's markets, college campuses, neighborhood festivals, and other locations where people gather (Portland Opera, 2016). The vehicle was funded by grants four grants both local and national: OPERA America; the Oregon Cultural Trust; the Oregon Community Foundation; and Macy's. "Opera a la Cart" had its first season in 2016, and was said to contain a "nice mix of pop-up and planned performance." Based on the cast of singers that day, the food truck will put out a "menu" of selections from each individual singer's repertoire.

The truck is taken to various outdoor events in Portland to both take advantage of the summer months and reach a new demographic of people. Burovac is positive about this program, saying it allows people to recognize opera, break down traditional barriers and stereotypes, all by happening upon the opera truck while engaged in their traditional routines.

To speak more on education and outreach at Portland Opera, I interviewed Alexis Hamilton the Manager of Education and Outreach on March 24, 2017. Hamilton writes all curriculum of the company's regional outreach tour, Portland "Opera to Go", which condenses classic operas into 50-minute English-language performances for school-aged children. Each year, Portland "Opera to Go" serves between 17-20,000 students kindergarten through 5th grade in Oregon and southwest Washington (Portland Opera, 2016). Student dress rehearsal performances and student rush tickets for the mainstage season also help the organization reach more than 25,000 young people annually (Guidestar, 2016).

Seattle Opera

Overview

Founded in 1963, Seattle Opera is committed to advancing the cultural life of the Pacific Northwest with performances of the highest caliber, and through innovative education and community programs that take opera far beyond the McCaw Hall stage (Seattle Opera, 2017). The mid-sized opera company based in downtown Seattle, WA, is driven forward by their mission: "By drawing our community together and by

offering opera's unique fusion of music and drama, we create life-enhancing experiences that speak deeply to people's hearts and minds" (Seattle Opera, 2016).

The Seattle Opera is most well-known for their landmark performances that have gained the company global recognition (Seattle Opera, 2016). Under the direction of the first General Director, Glynn Ross, Seattle Opera presented the world premiere of Carlisle Floyd's opera *Of Mice and Men* in 1970. Succeeding Ross in 1983, General Director Speight planned and implemented the 2010 Ring Cycle production, performing all four operas of the Wagner Ring Cycle in a single season, and successfully integrating new forms of technology in marketing, performance, and community engagement to extend their reach to audiences and the Seattle area.

The current General Director of Seattle Opera is Aiden Lang, who succeeded Speight Jenkins in 2014. Lang has ushered in innovative programs that continue to serve the community both on and off the mainstage. Now making operatic headlines is Lang's production of *As One*, an opera about a transgender woman's search for self. The show has received rave reviews along the West Coast and beyond, as this opera uses music to discuss and portray the timely social awareness issue of transgender individuals as they journey, and often fight for rights, in modern American society.

To accompany the revolutionary *As One*, Seattle Opera also produced *The Combat* which combines the work of Monteverdi and Couperin to explore how differing cultural identities impact the lives of two star-crossed lovers. Leos Janacek's *Katya Kabanova* retells the story of a small-town girl trapped in a dull arranged marriage who finds true love with another man, with music inspired by Slavic folk songs.

To complete the season, the crowd favorite Verdi's *La Traviata* ends the 2016-2017 season.

Data Collection

Due to his busy travel schedule, I was unable to speak with Aiden Lang about his programming decisions in detail. Luckily, I interviewed Seattle Opera's Manager of Artistic Administration, Mary Brazeau. Reporting to Aren Der Hacopian, the Director of Artistic Administration & Planning, Brazeau assists with all casting and budgeting of each programming season.

Like the Portland Opera, the chief repertoire planning decisions are made by Aiden Lang. Brazeau insists that it is important for the opera company, and its corresponding repertoire, to reflect the General Director's passion. Without it, Brazeau insists, the seasons receive a "warmed-over" feeling. Yet again like Portland Opera, the departments give Lang input about production expenses and ticket sales, but serve in more of an advisory role.

Seattle Opera's timeline for choosing season repertoire has changed in recent years. In the past, the company would plan 4 to 5 seasons out and have the production expenses set far ahead of time; however, the company is implementing productions just two seasons out. Lang and his advisors are only now just completing planning for their 2018-2019 season. Brazeau notes that the company is not planning as far ahead as they once were for two reasons. The first is to remain flexible and open to the ever-changing cultural environment. The second is to combat insecurity in audience attendance stemming from completion for entertainment in the area, and high expectations for the high-dollar ticket. Seattle Opera's season consists of a balance of

new work, a variety of languages and eras, and the classic “barn burners” that sell tickets.

The biggest challenge in the opera sector in Brazeau's eyes is making audiences take a chance on opera for the first time. To combat this, Seattle Opera works to balance their season programming to provide “the comfort food and then the new,” and reaching people in a more intimate way to eventually get them to “buy into the bigger scene.” She is also optimistic about opera, saying “Opera is different. Once people are touched, you have them for life” (Brazeau, 2017).

San Francisco Opera

Overview

Matching the entrepreneurship, innovation, and community involvement of the San Francisco Bay Area, the San Francisco Opera has been producing high quality opera for more than 150 years (San Francisco Opera, 2017). Starting in the Gold Rush of the mid-19th century, San Francisco has positioned itself very early on as the West Coast's leading, and until the later part of the 20th century, only grand opera company. Between 1851 and 1906, the company flourished and produced nearly 5,000 performances in 26 different theaters (San Francisco Opera, 2017). In 1923, the company was established as a resident company and sought to find a permanent home in the city. After multiple attempts at funding and building an opera house spanning almost a century, San Francisco Opera moved into the Beaux-Arts-style War Memorial Opera House in 1932 (Zietz, 1996, p. 129). Built during the Great Depression, the opera house gained its name sake from San Franciscans who served in World War I

and became the first American opera house built entirely through community donations (San Francisco Opera, 2017).

With almost 100 years of history, San Francisco Opera serves as one of the largest and oldest opera institutions on the West Coast. Boasting a high-quality training program for young singers, the Merola Opera Program, San Francisco has a long history of commitment to outstanding vocal artistry and developing young talent. The company is also passionate about bringing opera into the community through state-of-the-art technology, much like that of the Metropolitan Opera (San Francisco Opera, 2017). As far as programming, San Francisco Opera remains traditional in producing mostly European opera selections; however, the company does offer a few new works with each season.

Data Collection

Sean Waugh, the Artistic Planning Manager at San Francisco Opera, has been a member of the artistic team at San Francisco Opera (SFO) since 2010. His duties include casting, contracting, personnel management, and artistic operations.

Historically, SFO's season programming planning was led by the company's General Director with input from the Music Director and a select few of the company's Executive Team, much like the Portland Opera and Seattle Opera. Repertoire decisions were formed four to five years in the future with contracts for productions and casting assignments being completed two to five years ahead of time.

Departing from tradition, the newly appointed General Director created and implemented a Season Planning Team made up of five individuals to collaborate on season repertoire selection and other programming initiatives in 2016. Together with the General Director, the Season Programming Team is comprised of the Managing Directors of Artistic, Production, Operations, and Philanthropy and Audiences. The team, does use a more traditional model of programming which balances new works repertoire cannon by composers like Puccini, Verdi, and Mozart. An important and additional note, union constraints are often considered throughout the planning of each season to correctly balance the needed number of cast and crew members with the artistic and budgetary needs of the organization. Due to recent addition of the Season Programming Team to the San Francisco Opera's programming process, the repertoire for the 2018-2019 season has only just been assembled and selected.

Waugh admits that much of opera programming has traditionally been "star-driven and not audience driven," meaning that repertoire is often selected to cater to specific singers with name-recognition or potential "star-power". Much like its Midwestern counterpart, the Lyric Opera of Chicago, the San Francisco Opera relies on its prestige and countless years of high-quality productions to attract audiences. This programming practice often attracted audiences, but did not facilitate community engagement through which San Francisco Opera and the Bay Area could ultimately benefit. However, the company is slowly moving away from "star-driven" operas that involve well-known singers, popular composers, and traditional productions to appease their audience base. In recent years, SFO has started to incorporate user experience aspects, like specific repertoire choices to reflect societal trends and community

engagement initiatives, and use the many talented SFO artists to tell a story through opera.

This shift can be seen in the current 2016-2017 season, that emphasizes newer works with traditional productions of opera classics. San Francisco Opera commissioned *Dream of the Red Chamber* by Bright Sheng, based on one of China's greatest classical novels. SFO also produced the Umberto Giordano's *Andrea Chenier*, chronicling the trials of a poet and servant-turned revolutionary competing for the affection of a young aristocrat in the shadow of the French Revolution, as well as Janacek's *The Makropulos Case*, a co-production with the Finnish National Opera. Other selections from SFO's current season are Donizetti's *Don Pasquale*, Verdi's *Aida*, Puccini's *Madame Butterfly*, Verdi's *Rigoletto*, Mozart's *Don Giovanni*, and Puccini's *La Bohème*.

Chapter Summary

After comparing the wide array of repertoire choices present in season programs of leading American opera companies, and doing my own research on the processes of three major West Coast institutions, I have surmised that more collaboration among the internal functions of the organization is necessary. Today's opera companies are bombarded with a variety of external and internal challenges that often distract from the innovation and artistry that drives the operatic art form forward and encourages a new audience demographic.

Chapter 5- Findings and Recommendations

Restatement of Purpose

To reiterate the purpose of this study, a collective case study was performed to gain further understanding of the external and internal factors of opera repertoire selection to increase audience participation nationwide, and explore the determinants of operatic programming among major West Coast opera companies.

Through two literature reviews, a collective national analysis of opera companies, and a case study analysis, I succeeded in uncovering the programming process of major opera companies and gained further insight on how and why certain titles are included in season repertoire.

Research Questions

The following research questions were used to guide the study:

- **Main Research Question:** What are the external and internal factors on the selection of season repertoire and programming taking place in major opera companies on the west coast?
- **Sub questions:**
 - What is involved in the programming process, the timeline, and who are the key decision makers?
 - How is repertoire chosen, and for what reasons?

- Is the season programming relevant to current events or societal trends?
- What are the changes, challenges, strengths, and opportunities of opera programming and how is repertoire selected to combat this change?

These questions were created with the intent of collecting data from organizations through interviews of key administrative staff of each case study site. In total, 8-15 people were contacted at each case study site. Many did not respond to my request, others due to time constraints or travel could not contribute, and others declined because they were not involved in the programming process or because they could not accurately represent the organization.

For all three case study sites, I interviewed five people. The information I gathered from these interviews clarified the process of operatic programming, but did not involve the varied internal staff contributions and external audience consideration that I had first thought would influence repertoire programming. Also, due to my lack of access to certain key members of the organization specifically involved in programming, findings are limited and offer many further avenues for future research.

Summary of Findings

It is frequent practice among opera companies to defer all repertoire decisions to the General or Executive Director. The title of Music Director most often is held for the leader of both the orchestra and singers on stage, and may offer feedback about season programming, but is for the most part uninvolved. The same is true for other members of the organization, with the artistic department researching production costs

and the marketing department creating potential promotional campaigns to kick-start the season budgetary process; however, the final decision typically rests with the Executive Director alone.

In my research, it was somewhat unclear how the Executive Director would choose the specific operas in each season, referring normally to a specific “formula” for season structure. Depending on the organization, five to eight shows would be performed in each season, with no same title appearing less than seven years apart. Often, at least two of the operas will be well-known titles or “barn-burners” that audiences flock to see, and will easily fill large auditoriums. Most Executive Directors will then choose a lesser known work with a well-known opera composer, to help the audience make a leap into a new opera in good conscience because of the familiar name tied to it. Due to the national trend, many Executive Directors are electing to commission, produce, and/or perform opera written in the past twenty years. However, this portion of programming is reserved for the two larger companies of Seattle and San Francisco because of the financial fortitude required to take on such a project.

The only organization to stray from the model of Executive Director leading the repertoire selection process was San Francisco Opera. As of 2016, San Francisco's new Executive Director, Matthew Shilvock, created the Programming Committee that consists of five Department Heads meant to increase awareness of internal and external factors while choosing season programming. Using the “two heads are better than one” mentality, San Francisco Opera is now able to expand their reach and consider all aspects prior to creating a season.

Contrary to the web based research of season programming in a variety of opera companies as well as literature review of repertoire stagnation in the past three decades, many of the informants claimed that their organization disregarded national repertoire trends and social issues. The informants, and executive leadership of the organizations, also stood behind their performances even after negative audience reviews.

Recommendations

Based only on the three case study sites, I found that only one of the three included key staff members from departments outside of artistic administration and involved group decisions making at all. While the Executive Director holds his/her position because of their artistic mission and repertoire knowledge, it can be argued that one person can only know so much. ***If key staff and department heads are included in the planning process, further opportunities for collaboration may present themselves.*** The development department may be able to suggest an opera that would fit a grant description; the education department may want to write curriculum that fits into the theme and allows greater discussion among the community through opera; the marketing department may have insights on what audiences enjoy seeing and what other companies in the area are doing.

Furthermore, when I reached out to my informants initially, many declined because they were not involved in the process or knew very little to nothing at all about repertoire programming decisions of the company. To move forward with a mission and

vision, it is imperative to include the staff, no matter their position, on the basics of how and why the season was chosen. This way, anyone who has contact with the community is able to accurately and confidently describe their organization's mission through programming.

Opera has evolved into a deeply passionate art form, with plot points that are still incredibly relevant to the modern viewer. In today's modern world, it is imperative that opera companies begin to unwrap the universal themes of love, war, grief, and happiness that opera conveys so well and relay it to 21st century audiences. Opera, with all its storytelling gold and universal plot points, can often be woefully out-of-date. This causes the art form to serve as more of a museum piece rather than the lively art form it should be.

To bridge this gap between the old stories in new surroundings, **opera companies should do more to reflect social and political trends in their on-stage story-telling.** It could be as simple as developing a season theme with lectures that tie current issues into that evening's show, to commissioning a new work about a recent event. To engage audiences and make them feel that the show they are watching fits into the larger puzzle of their lives is a crucial step in gaining new, younger audiences that will help American opera continue to evolve.

The final recommendation from my research is for opera companies **to allow the audiences a chance to "participate"** in the performance, by connecting the art form and the message they are portraying to the patrons' daily lives. Patrons of opera companies and performing arts companies nationwide are looking for an inclusive

experience with options for participation, intrigue, and crossover into their own lives. It is imperative that opera companies not program operas one a whim or because they sell tickets, but because the conveyed message is contributing to the larger community/city/region/country the company is a part of.

Avenues for Future Research

Due to the relatively small amount of input received in my data collection process, and the barriers of access to key executive management staff, further research on repertoire programming of major opera companies is required. Executive directors are the most important informants to secure interviews from, as their decisions seem to be the more traditional process behind programming. As other areas of the country may differ slightly in their programming processes, it would be useful to perform this same study in different regions of the United States that have different audience demographics than the West Coast. Also, examining the repertoire selection in smaller organizations with fewer staff and resources would serve as an excellent contrary research avenue to my examination of large opera companies.

A less tangible aspect not fully developed in this research study was the effects of programming on the audience itself. Very little information was collected about audiences regarding a season's ability to attract new members, be thought-provoking, increasing box office sales, and how loyal audiences enjoyed the production. Due to time constraints, barriers to key informants, and the incredible scope discovered in the processes of repertoire programming, no time was spent on how repertoire effects

audience development. The relation between stagnation of repertoire and the common public perception of “elitist” opera could also be explored in audiences. While many companies may be hesitant to give accurate data on this, it would be a fascinating extension of this research study and could lead to significant innovations for future arts leaders.

Conclusion

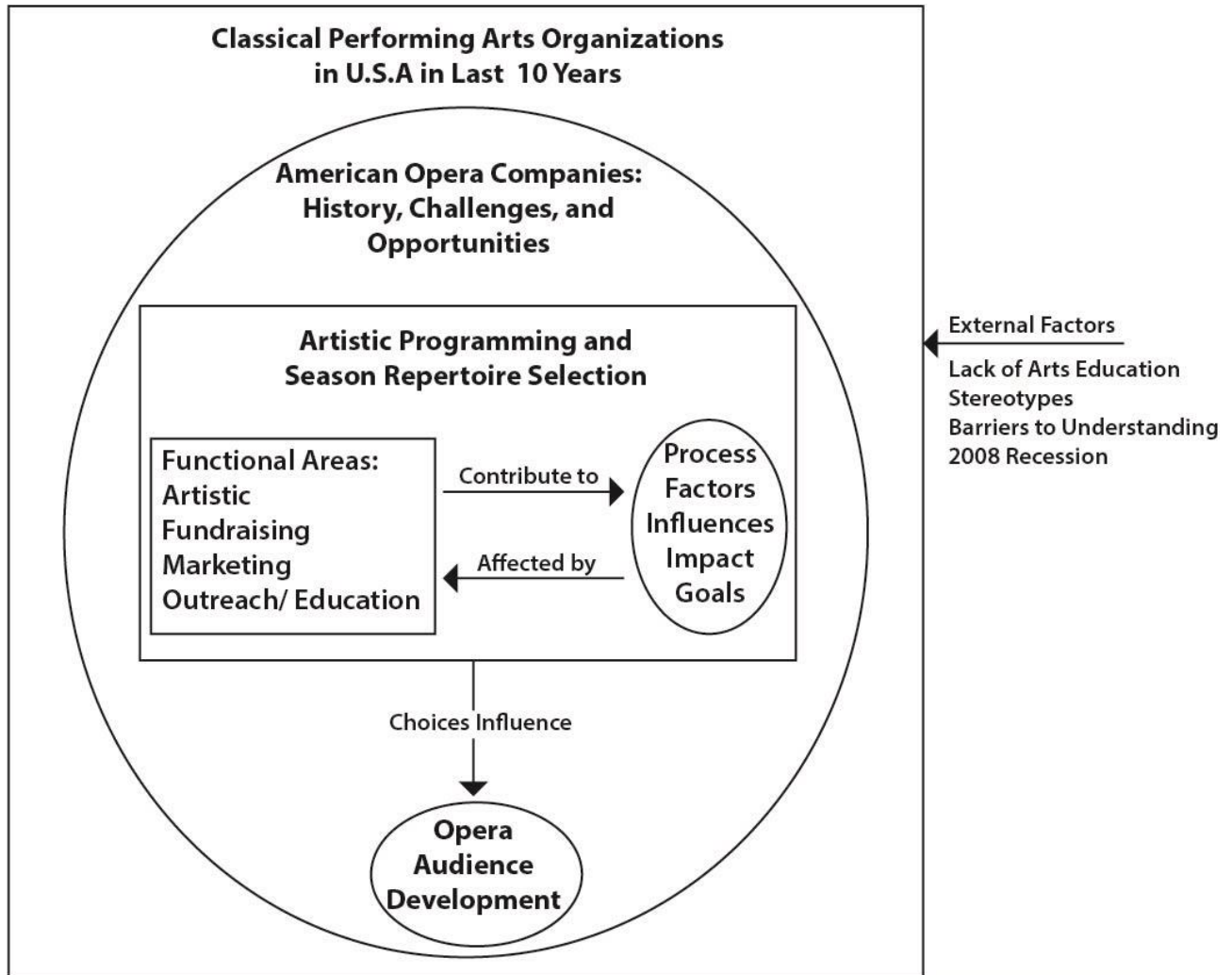
This case study was conducted to explore the processes of season programming in leading American Opera companies, and the internal and external effects of repertoire decisions. It was also meant to fill a gap in research regarding repertoire decisions, as literature regarding repertoire selection focuses more on the numbers and less on the process behind it. The outcome of this study produced some intriguing findings that offer two distinct approaches to season programming that may prove useful to emerging opera administration leaders. The data collected and findings stemming from said collection are broad enough to be applied to other opera companies across the nation; however, due to the lack of access to the organization, all findings and recommendations should be taken to represent a very small dataset.

Based on the literature and data collected in this study, opera companies across the nation appear to be following a similar formula to that of West Coast opera companies. I believe that opera companies are adhering to tradition and listening to their audiences; however, I contend that more can be done to stay relevant in times of momentous change and turbulence. As opera companies continue to grow into the

21st century, it is imperative that the ancient art form with so many stories to tell continues to speak to audiences through timely programming and thoughtful repertoire choices.

Appendices

Appendix A: Conceptual Framework Schematic



Appendix B: Detailed Research Timeline

Fall 2016

- Compile full research proposal
- Create research instruments
- Create recruitment letters and consent forms
- Complete and submit human subject requirements
- Plan final document layout

Winter 2017

- **January**
 - Revise proposal
 - Refine research instruments
 - Submit human subject application documentation
 - Convert proposal into chapter drafts
 - Plan (with research advisor) due dates of chapters
 - Begin to plan site visits
- **February**
 - Prepare detailed outline of full document
 - Begin to submit chapter drafts
 - Send out recruitment letters and follow-up accordingly
- **March**
 - Send Consent forms to accepted interviewees
 - Begin data collection through interviews

Spring 2017

- **April**
 - Continue interviews
 - Complete and compile data collection
 - Continue with data analysis
 - Write full first draft of final document
- **May**
 - Draft of full document to be submitted to advisor
 - Feedback from advisor
 - Student presentation of master's research
 - Continue revisions of full document
- **June**
 - Submit final document and PDF file

Appendix C: Interview Protocol

Interview Protocol

Case Study:

Key Descriptor:

Date:

Interview Location:

Interviewee Details:

Consent: ___Written ___Audio Recording ___Video Recording ___OK to quote

"Thank you" sent out? ___

Key Points:

CODING

INFORMATION

NOTES

Appendix D: Recruitment Letter



BRITTNEY LEEMON

bleemon@uoregon.edu | (608) 338-5793

March 10, 2017

Dear Sir or Madam,

You are invited to participate in a research project entitled *Repertoire Programming Decisions of Major West Coast Opera Companies*. This research project is being conducted by me, Brittney Leemon, for the completion of a Master's thesis at the University of Oregon Arts and Administration Program. The purpose of this study is to understand the external and internal factors of opera audience participation nationwide, and explore the determinants of operatic programming among major West Coast opera companies.

Because of your leadership position with OPERA America and your extensive experience in specific arenas of opera administration, you were selected to participate in this study. As a professional in the opera field, your insight and knowledge of programming impacts is vital to the sector wide understanding of the correlation between repertoire, audience development, and organizational growth initiatives.

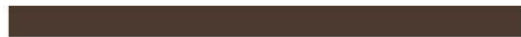
If you are interested in participating, please see the following page for more detailed information on the specifics of this study and on being a research informant. Please contact me via phone, (608) 338-5793, or email, bleemon@uoregon.edu, for questions or to schedule an interview.

All the Best,

Brittney Leemon

1





Purpose of the Study

While opera is a staple of the classical music tradition, the field has seen a significant decline in interest over the past few decades due to a variety of factors: decrease in arts funding; influence of new forms of technology; ever-increasing competition for leisure-time activities; barriers of understanding in traditional opera. To combat these factors, many opera companies around the US have adjusted their season programming to change public perceptions of the art form and attract audiences.

However, there is a gap in research on how programming decisions are related to audience and organizational development initiatives. Detailed information on the contributing factors involved in choosing repertoire is needed to further explore the use of season programming to promote internal and external growth. To bridge this knowledge gap, this study aims to conduct an exploratory analysis of three case study opera companies: San Francisco Opera, in California; Portland Opera, in Oregon; and Seattle Opera, in Washington.

The Interview

If you decide to take part in this research, you will be asked to participate in an in-person interview, lasting approximately one hour, in March or April of 2017. Interview questions will be provided beforehand for your consideration. Interviews will be conducted via phone or video chat. Interviews will be scheduled at your convenience.

All participants will be identified by name, job title, and commentary in presentation/publications of this research project. A consent form for participation in this study will be provided prior to the interview. In addition to taking handwritten notes, with your permission, an audio recording app will be used for transcription and validation purposes. You may also be asked to provide follow-up information through phone calls or email.

Contact Information

If you have any questions or would like to set up an interview, contact me at (608) 338-5793 or bleemon@uoregon.edu.

You may also contact my research advisor, Dr. Patricia Dewey at (541) 346-2050 or pdewey@uoregon.edu.

Any questions regarding your rights as a research participant should be directed to the Office for the Protection of Human Subjects, University of Oregon, Eugene, OR 97403, (541) 346-2510.



Appendix E: Consent Form

BRITTNEY LEEMON

bleemon@uoregon.edu | (608) 338-5793

March 29, 2017

Research Protocol Number: **12062016.009**

Informant Number: **1216**

Repertoire Programming Decisions of Major West Coast Opera Companies

Brittney Leemon, Principal Investigator
University of Oregon Arts and Administration Program

Purpose of the Research Study

You are about to participate in the research project entitled *Repertoire Programming Decisions of Major West Coast Opera Companies* conducted by Brittney Leemon, of the University of Oregon's Arts and Administration Program, for completion of a Master's thesis. The purpose of this study is to explore the process of operatic programming decisions and further understand the affects season repertoire has on all aspects of the organization.

Over the past 10 years, there has been declining interest in opera resulting in small audiences and struggling organizations. While there are many contributing factors to this decline, there is a gap in research on how and why programming affects the audiences of opera companies. To address the sector-wide problem, this study aims to conduct an exploratory analysis of three case study opera companies: San Francisco Opera, in California; Portland Opera, in Oregon; and Seattle Opera, in Washington. In this study, the initiatives undertaken by staff to safeguard their organizations and the use of season repertoire to expand potential opera audiences will be explored.

The Interview

Your interview will take place on Friday, March 29, 2017 at Portland Opera, Hampton Opera Center, 211 SE Caruthers Street, Portland, OR. The approximate timeline of the interview will be as follows: introductions; Verbal Consent of Research Participation; Discussion of Research Questions; Wrap-up.



Your Consent

Your consent to participate in this interview, as indicated below, demonstrates your permission to relinquish confidentiality and list your name in any resulting documents or publications. To mitigate these risks, permission to participate in the study should be obtained from you supervisor(s) to avoid potential social or economic risks related to speaking as a representative of your institution. Second, a copy of the interview questions was sent to you prior to the interview for your consideration and contemplation of sensitive subjects. Finally, you will have the opportunity to review your comments prior to publication. At any time, you may withdraw your consent, discontinue participation in this study, and have all commentary stricken from the record.

Any information that is obtained in this study will be carefully and securely maintained. All research notes and institutional documents will first be coded, then stored in a password protected computer and locked home office file. Only my faculty research adviser and I will have access to the data. Audio recordings will be downloaded onto a password protected computer, and will be deleted after the research project is complete. Confidential institutional documents, interview protocol documents, and audio recordings will be destroyed one year after the conclusion of the research project.

I anticipate that the results of this research will be valuable to the cultural sector, especially West Coast opera companies. However, I cannot guarantee that you personally will receive any benefits from this research.

If you have any questions, please feel free to contact me at (608) 338-5793 or bleemon@uoregon.edu.

You may also contact my research advisor, Dr. Patricia Dewey at (541) 346-2050 or pdewey@uoregon.edu.

Any questions regarding your rights as a research participant should be directed to the Office for the Protection of Human Subjects, University of Oregon, Eugene, OR 97403, (541) 346-2510.





Verbal Consent

Requirements of Participation- The following statements are necessary for participation in this study, and require your consent:

- I consent to my identification as a participant in this study.
- I consent to the potential use of quotations from the interview.
- I consent to the use of information I provide regarding the organization with which I am associated.
- I consent to the use of audio recordings during my interview.

Optional- The following statements are optional details for your consideration and consent:

- I want the opportunity to review, and possibly revise, my comments and/or the information I provide prior to this data appearing in the final version of any publications that may result from this study.

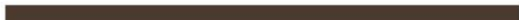
Your verbal consent given below indicates that you have read and understand the information above, that you have received a blank copy of this form, that you willingly agree to participate, that you may withdraw your consent at any time and discontinue participation without penalty, and that you are not waiving any legal claims, rights or remedies.

Signature: _____ Date: _____

Thank you for your interest and participation in this study.

Sincerely,

Brittney Leemon
361 E. 13th Ave, Apt. 11, Eugene, OR 97401



Appendix F: Interview Questions

BRITTNEY LEEMON

bleemon@uoregon.edu | (608) 338-5793

Research Interview Questions

1. What is your portfolio of responsibilities at [City] Opera?
2. What is your role in the season programming process, and who else is involved at [City] Opera?
3. Could you describe the timeline of season programming? When do you start planning for a season, and how long does the full process normally take?
4. How is repertoire selected, and what factors do you take into consideration?
 - a. Does the chosen repertoire reflect current events and societal trends?
 - b. Does the chosen repertoire purposely reflect or disregard trends of other opera companies in the region or across the country? Why?
5. How does the positive/negative reception of certain productions influence the programming for future seasons, if at all?
6. In what way does season programming influence the efforts of other departments in the company (i.e. marketing, fundraising, education)?
 - a. Have certain departments ever requested certain opera selections for the benefit of their department?
 - b. If so, have their requests been included in programming decisions?
7. What changes and challenges have you seen in [City] Opera in the past 5-10 years?
 - a. How have you positioned your repertoire to combat these changes/challenges?
8. What strengths and opportunities have you seen in [City] Opera in the past 5-10 years?
 - a. How have you positioned your repertoire to take full advantage of these strengths/opportunities?

General Interview Timeline

1. Introductions
2. Verbal Consent of Research Participation
3. Discussion of Research Questions
4. Wrap-up

Appendix G: Resume

Brittney Leemon

(608) 338-5793 • brittney.leemon@gmail.com



Education

Master of Science, University of Oregon, Eugene, OR **June 2017 (Expected)**

Performing Arts Management Concentration & Certificate in Nonprofit Management

Bachelor of Arts, Luther College, Decorah, IA **May 2014**

Major: Vocal Performance; Minor: Business Management

Relevant Work Experience

Development Intern, Jordan Schnitzer Museum of Art, Eugene, OR **April 2017- Present**

- ☒ Receive training on the Advance Database with the University of Oregon Foundation.
- ☒ Prep and mail new individual membership packages within one week of submission.
- ☒ Align the UO Foundation database with the Museum's "shadow" membership database.
- ☒ Retrieve membership entries from Front Desk and the UO Foundation databases.
- ☒ Refresh acknowledgement and solicitation letters with updated wording and programming.
- ☒ Serve as a Development representative at various receptions and special events as needed.

Receptionist, Moss Street Children's Center, Eugene, OR **September 2016- Present**

- ☒ Interact in a friendly and patient manner with visitors to the front desk and building, fielding questions and concerns with up-to-date information and follow-up contact information.
- ☒ Process, record and deposit tuition payments and distribute receipts/invoices.
- ☒ Enter data and update parent/child records accurately with the help of the Office Manager.
- ☒ Answer calls to front desk for general inquiries, transfer to appropriate classroom or staff member, as well as retrieve voice messages and emails.
- ☒ Maintain, organize, and curate office hard files.

Administrative Chair, Emerging Leaders in the Arts Network, Eugene, OR **September 2016- Present**

- ☒ Attend all ELAN meetings, community functions, and events.
- ☒ Coordinate weekly meetings, create meeting agendas and document proceedings.
- ☒ Secure clear, concise lines of communication with all ELAN members via email, phone, and in-person.
- ☒ Curate the Google Drive, ensuring that all documents are stored in appropriate folders & accessible to those who need them.
- ☒ Plan, implement, and execute various professional development workshops, lectures, and special events over the academic year.
- ☒ Communicate effectively and positively work with venues, vendors, and catering.
- ☒ Head the Event Operations team for the annual fundraiser, Beats & Brushstrokes, which manages equipment rental, volunteer management, event flow, and box office functions.

Board Member, Cascadia Concert Opera, Eugene, OR **February 2016 – April 2017**

- ☒ Updated and refreshed Cascadia Concert Opera's official website in WordPress.



- ☒ Create the 2016 and 2017 marketing materials in Adobe Creative Suite.
- ☒ Engage in communication with venue managers, board members, and donors.
- ☒ Promote all performances through various social media, print, and email platforms.
- ☒ Work with other board members to increase accessibility and inclusion through programming.

Development Intern, The Glimmerglass Festival, Cooperstown, NY June - September 2016

- ☒ Acquired advanced skills in the donor database software *SalesForce*.
- ☒ Invited selected donors to events via email and phone, and tracked their invitation status daily.
- ☒ Oversaw the "master" RSVP lists and tracking donor attendance at events.
- ☒ Served as invitee concierge with the help of the Patron Services Manager.
- ☒ Assisted with coordination of events including set-up, catering, and tear-down of weekly events.
- ☒ Interfacing (on phone and in person) with donors regarding benefit fulfillment.
- ☒ Wrote call reports based on relevant information gathered from conversations with donors.
- ☒ Conducted prospect research on new ticket buyers, and reviewed annual donor information.
- ☒ Assisted in pre-season mailing of donor benefit materials and the post-season direct mail campaign.
- ☒ Oversaw schedules of development staff, created weekly run schedule, and assisted with weekly Development meetings.

Development Intern, Ballet Fantastique, Eugene, OR March - June 2016

- ☒ Created annual development plan which included a donor cycle, membership structure, and development calendar for the 2016-2017 fiscal year.
- ☒ Gained experience using the donor database software *Little Green Light*.
- ☒ Attended individual donor stewardship and cultivation receptions.

Sales Associate, Cornblooms Boutique, Madison, WI August 2014- September 2015

- ☒ Proactively acknowledge, greet and assist store customers with kindness and patience.
- ☒ Serve multiple customers, discovering their needs, and making recommendations.
- ☒ Manage the register and handle cash, check and credit card transactions.
- ☒ Stay on feet for entire shift, and lift 20-30lbs when needed.

Events Specialist, Madison Ballet, Madison, WI December 2014- April 2015

- ☒ Secured \$10,000 at the ballet's annual fundraising gala in March of 2015.
- ☒ Oversaw event logistics, including: invitation mailing; menu selection; event decoration.
- ☒ Tracked sponsorship and corporate table purchases.
- ☒ Secured donations from 40+ local business for the gala's silent auction.
- ☒ Directed a group of volunteers who assisted with the silent auction planning and day-of logistics.
- ☒ Designed a silent auction system that tracked bidding, payment, and prize delegation to winners.
- ☒ Sent Thank-You letters to community donors, volunteers, and individual donors.
- ☒ Assisted in clerical record management, data entry, and planning meetings with key staff.

Appendix H- CITI Training Completion Form

COLLABORATIVE INSTITUTIONAL TRAINING INITIATIVE (CITI PROGRAM) COMPLETION REPORT - PART 1 OF 2 COURSEWORK REQUIREMENTS*

* NOTE: Scores on this Requirements Report reflect quiz completions at the time all requirements for the course were met. See list below for details. See separate Transcript Report for more recent quiz scores, including those on optional (supplemental) course elements.

- **Name:** Brittny Leemon (ID: 5956666)
- **Email:** bleemon@uoregon.edu
- **Institution Affiliation:** University of Oregon (ID: 831)
- **Institution Unit:** AAD

- **Curriculum Group:** Human Research
- **Course Learner Group:** Social-Behavioral-Educational Researchers
- **Stage:** Stage 1 - Basic Course

- **Report ID:** 21407525
- **Completion Date:** 09-Nov-2016
- **Expiration Date:** 09-Nov-2018
- **Minimum Passing:** 80
- **Reported Score*:** 91

REQUIRED AND ELECTIVE MODULES ONLY	DATE COMPLETED	SCORE
Belmont Report and CITI Course Introduction (ID: 1127)	08-Nov-2016	3/3 (100%)
Cultural Competence in Research (ID: 15166)	08-Nov-2016	4/5 (80%)
History and Ethical Principles - SBE (ID: 490)	09-Nov-2016	5/5 (100%)
Defining Research with Human Subjects - SBE (ID: 491)	08-Nov-2016	5/5 (100%)
The Federal Regulations - SBE (ID: 502)	08-Nov-2016	5/5 (100%)
Assessing Risk - SBE (ID: 503)	09-Nov-2016	4/5 (80%)
Informed Consent - SBE (ID: 504)	08-Nov-2016	5/5 (100%)
Conflicts of Interest in Research Involving Human Subjects (ID: 488)	09-Nov-2016	5/5 (100%)
Unanticipated Problems and Reporting Requirements in Social and Behavioral Research (ID: 14928)	09-Nov-2016	5/5 (100%)
Populations in Research Requiring Additional Considerations and/or Protections (ID: 16680)	09-Nov-2016	4/5 (80%)
Students in Research (ID: 1321)	09-Nov-2016	3/5 (60%)

For this Report to be valid, the learner identified above must have had a valid affiliation with the CITI Program subscribing institution identified above or have been a paid Independent Learner.

Verify at: <https://www.citiprogram.org/verify/77104cb90-4dd3-4e57-a6b1-2ef6fb880c5c>

CITI Program
Email: support@citiprogram.org
Phone: 888-529-5929
Web: <https://www.citiprogram.org>

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