

*BEYOND TRADITION: AN UPDATE*

REVISITING PARTNERSHIPS AMONG ORCHESTRAS, SCHOOLS, AND COMMUNITIES

by

DAVID L. FAIRCHILD

(Under the Direction of Mary Leglar)

**ABSTRACT**

In 1996, David Myers, with assistance from the League of American Orchestras (LOAO), published a report entitled *Beyond Tradition: Partnerships Among Orchestras, Schools, and Communities*. The report, funded by the National Endowment of the Arts, examined the outreach programs in American orchestral arts organizations and presented detailed information gathered from site visits made to nine orchestras.

The purpose of this study was to give a brief history of arts outreach in the United States, examine the original report by Myers, address relevant literature reporting on arts outreach in symphony orchestras during the last twenty years, provide new data from the LOAO to compare with the 1996 survey, and chronicle the current state of outreach in the nine orchestras examined in the original report.

The following questions guided the research.

- 1a. What is the current status of educational outreach by LOAO member organizations?
- 1b. What changes have taken place over the last 20 years?
- 2a. What is the current status of the outreach programs profiled in the Myers Report?
- 2b. Did the Myers Report change or impact the outreach programs of the profiled orchestras?

Supported by the findings in this study, it may be concluded that, although the LOAO reports revealed a number of statistically significant differences in the organization, staffing, and funding of outreach programs since the 1996 Myers Report, the orchestral outreach organizations in the United States appear to be thriving. As evidence, many of the programs reported in the 1996 document are still in existence. Recovering from the Great Recession, orchestras are using technology to broaden the scope of their outreach activities without increasing cost, and dedicated funding directed toward ed/comm activities is proving to be the best way to ensure long-term community engagement.

INDEX WORDS:     Community Engagement, Symphony Orchestra, Educational Outreach.

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## DEDICATION

This dissertation is dedicated to my wife, Virginia; my mother, Kay; my children, Katelyn and Joshua; and my as-of-yet unborn baby girl. This project has occurred during a large change in almost every aspect of my life, and it would not and could not be possible without the support of my family.

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## CHAPTER 1

### OVERVIEW OF THE STUDY

#### INTRODUCTION

In 1996, David Myers, with assistance from the League of American Orchestras (LOAO), published a report entitled *Beyond Tradition: Partnerships Among Orchestras, Schools, and Communities*. The report, funded by the National Endowment of the Arts, examined the outreach programs in American orchestral arts organizations and presented detailed information gathered from site visits made to nine orchestras. The groups that received site visits were: the Austin Symphony Orchestra; Boston Symphony Orchestra, Inc.; Cedar Rapids Symphony Orchestra (now Orchestra Iowa); Chicago Symphony Orchestra; Fort Wayne Philharmonic; Milwaukee Symphony Orchestra, Inc.; New York Philharmonic; Pacific Symphony Orchestra; and the Pittsburgh Symphony Orchestra.

The original purpose of *Beyond Tradition* was to “research existing orchestra education partnerships and to derive principals that could be helpful in establishing model programs” (Myers and Thomas, 1996, p. 136). When reporting on the nine organizations, the research was organized into the following categories:

- An overview of the program
- The program’s overall concept
- Goals and objectives of outreach in the organization
- Program Planning and Implementation
- Program Support

- Assessment and Evaluation
- Impact on individuals and partner institutions
- Concluding Observation

## **PURPOSE AND NEED**

The purpose of this study was to give a brief history of arts outreach in the United States, examine the original report by Myers, address relevant literature reporting on arts outreach in symphony orchestras during the last twenty years, provide new data from the LOAO to compare with the 1996 survey, and chronicle the current state of outreach in the nine orchestras examined in the original report.

The following questions guided the research.

- 1a. What is the current status of educational outreach by LOAO member organizations?
- 1b. What changes have taken place over the last 20 years?
- 2a. What is the current status of the outreach programs profiled in the Myers Report?
- 2b. Did the Myers Report change or impact the outreach programs of the profiled orchestras?

## **DEFINITION OF TERMS**

The Myers Report (1996) employed particular definitions of interactions between schools, orchestras, and communities. This study will follow suit.

*Partnerships* are described as an ongoing relationship with two or more groups which share common concerns about a similar topic. In this case, orchestras, schools, and communities have many shared concerns which are often reflected in the nature of their relationships. These concerns may involve enhancing available music education opportunities and resources,



enriching the quality of music learning in schools through direct and meaningful interchange with professional musicians, connecting orchestras more closely with community life, broadening the base of support for the contributions of music to cross-curricular learning and school environments, developing diverse audiences for the symphony orchestra, sustaining a pool of qualified musicians and informed audiences, and creatively maintaining appreciation and support for the role of symphony orchestras in contemporary society (Myers & Thomas, 1996, p. 7).

Types of partnerships include *affiliations*, which “allow orchestras to support music education by providing youth concerts and in-school ensembles, and to work cooperatively to sustain these programs”; *coalitions*, in which “each partner assumes responsibility for different tasks, such as scheduling or materials preparation, and the partners communicate periodically to make sure tasks are accomplished”; and *collaborations*, which “involve working out of a relationship among partners, with commitments to mutual goal setting, program development, and evaluation” (Myers & Thomas, 1996, p. 8).

*The League of American Orchestras*, (LOAO) is the source of the survey information used in the original report and in this work. The LOAO is made up of the administration from member organizations from the U.S. and Canada.

*Outreach* is defined as any program created in part or whole by a professional symphony orchestra whose main purpose is to enhance the artistic environment of a group of people who would not otherwise be able to attend a concert. At times, outreach programs cater to the elderly or infirm; sometimes to certain diverse populations who may not be seen as frequenting a symphony concert (a Super Bowl audience, for example), and to children, who may not have an opportunity to discover interest in the performing arts because of their age or circumstances.

As outreach is becoming a more dated term, *Educational* or *Community* based activities are the way that most orchestras now define outreach. These two terms will be combined for brevity as ed/comm.

Because the questions in three separate surveys put out by the LOAO must be combined in a way to compare results across different groups and years, certain terms will be used for clarity. Each survey is divided into *sections*, which are focused on different subjects in the ed/comm surveys put out by the LOAO. Section 1, for example, asks about the size and function of ed/comm activities and the staff that handle them. A *question* is one of the direct and numbered items in the survey that ask a specific idea. Sometimes, a question will have multiple choices, which can be compared separately across surveys. These choices are treated as distinctly as the questions themselves, so these options will be referred to as *items*. When data from a question or from one of the multiple choices in a question is presented, it will be referred to as an *item*. Only when directly dealing with the verbiage and layout of the LOAO surveys will the word *question* be used.

The LOAO divides its member organizations into groups based on yearly budget. Group 1 represents those organizations with the largest budgets, and Group 8 contains those with smaller budgets. Many of the organizations with smaller budgets have a large impact on their surrounding areas, so are major influences in ed/comm activities. The survey combines groups 2-4 and groups 5-8 to make things clearer. For this reason, the three areas in each survey (Group 1, Groups 2-4 and Groups 5-8) will be called *classes*.

As the surveys are studied based on a single class across multiple years and a single year across multiple classes, each grouping of these numbers will be called a *data set*.

In this dissertation, the report titled *Beyond Tradition: Partnerships Among Orchestras, Schools, and Communities* by (Myers & Thomas, 1996) is referred to as the Myers Report or as *Beyond Tradition* for brevity.

## DELIMITATIONS

Using the Myers Report as a basis, the state of outreach in symphony orchestra organizations was updated using various sources of information. First, selected survey material released by the LOAO years was used to provide an updated look at similar data points through time. Although all years since the publication of the Myers Report are not reported in the LOAO material and the questions asked in their surveys have changed over time, every effort was made to show which data points were similar enough to be compared. The nature of the surveys also showed how the needs of outreach programs had changed in the last twenty years.

Various articles reporting on outreach programs since the Myers Report were used to provide context for the events and trends of the last two decades. Research dealing with orchestras outside the United States was occasionally referenced to show how a certain type of program or funding was present elsewhere, but the focus was largely on American organizations. Programs that function independently, such as the Carnegie PlayUSA and the many El Sistema-derived programs, were are not included in this dissertation.

The nine groups that received individual attention in the original report were reexamined to assess their evolution since 1996. However, the NEA funding that supported the on-site visits made by Myers was not available to the current researcher. Therefore, all information used for the current study was gathered via phone or email.

## **METHODOLOGY OVERVIEW**

To provide a historical profile of orchestral outreach, a review of activity was compiled from the 1960s, the beginning of outreach, to the publication of the Myers Report in 1996. The information contained in the Myers Report was examined thoroughly to provide the starting point for a study of subsequent trends and developments. The LOAO annual surveys used in the Myers Report and those available online for the years since were also consulted

Information on the present status of orchestral outreach programs was obtained from two sources: 1) the most recent LOAO surveys, and 2) researcher-conducted phone and email interviews with outreach personnel currently affiliated with the nine orchestras featured in the Myers Report. To establish trends over time, data from the most recent LOAO surveys and those from 1996-2017 were analyzed and displayed in table form. Graphic comparisons were made with the statistical information presented in the Myers Report. The results of the researcher's interviews with outreach personnel were compared with the results of the onsite visits conducted with personnel from the same programs in 1996.

## CHAPTER 2

### REVIEW OF LITERATURE

#### INTRODUCTION

Prior to 1960, symphony outreach programs were limited largely to presenting youth concerts. The most famous of these were led by Leonard Bernstein in 1958 with the New York Philharmonic and televised across the nation until 1972. Bernstein initiated the concerts two weeks after taking over the orchestra, and they were continued by subsequent conductors after his departure. “Several of the concerts—each of which consisted of an extended explanation of a basic musical idea, such as “What is a concerto?” or “Folk music in the concert hall”, and saw Bernstein playing examples from the piano and with the New York Philharmonic—were broadcast on CBS, on Saturday mornings, Sunday afternoons, and even, for three years, in prime time” (Bose, 2006, p. 121).

In the United States, few things happen on a large scale without major funding sources. Funding for outreach between symphonies or artists and the educational system began with federal funding in the 1960s, after the launch of the Sputnik satellite by the Russians. This new influx of funds, initially intended to help produce better engineers and scientists, was eventually funneled into arts education. Similarly, No Child Left Behind (NCLB) Title I funding, which was initially targeted toward core subjects, is currently being used to support the entire whole child approach.

To better understand the nature of arts cooperatives, it is important to reference the history of some of the larger and more influential funding initiatives. The most concise history of outreach and arts funding initiatives from the post-Sputnik era was a chapter of the *New Handbook of Research on Music Teaching and Learning* written by David Myers and Arthur Brooks (2002) entitled “Policy Issues in Connecting Music Education with Arts Education.” For the purpose of establishing context for this study, an historical synopsis of orchestra outreach programs, based largely on the 1996 Myers Report, and the Myers/Brooks chapter, is presented here. Various articles breaching the twenty-year gap between the 1996 Myers Report and 2017 are also referenced, as well as several from Australia, the United Kingdom, Canada, and New Zealand.

Material in this chapter is presented under the following headings: The Arts and Humanities Program, Funding for Arts Outreach, and Arts Partnerships (Artists in Schools, Students to Artists, Artists to Students, Minorities or Underprivileged, Side-by-Side Concerts, and Community Events).

## **THE ARTS AND HUMANITIES PROGRAM**

Due to increased funding in the post-Sputnik era, education became a well-supported and heavily- researched part of the American landscape. Cooperation between professional orchestras, composers, and schools were witness to this positive change. The Arts and Humanities Program (AHP), which began as part of the Division of Library Services and Continuing Education of the USOE, began concentrating on arts education in 1962 and continued until 1974 (Myers & Brooks, 2002, p. 909). The budget, which was \$20 million in

1965, grew to an impressive \$100 million in 1966. The first conference supported by the USOE/AHP was the Yale Seminar in 1963, followed by many others.

“The nearly 200 projects supported by USOE/AHP, mostly between 1965 and 1970, included studies in aesthetic education (which defined synonyms of *interdisciplinary*, *integrated*, and *related arts*). These projects-which included Artists-in-Schools, music education efforts such as the Manhattanville Project, research on Kodaly, research on Suzuki, and the Julliard Repertory Project, programs that introduced theatre and dance in school curriculums, Harvard’s Project Zero, and efforts to strengthen the arts in general education-ushered in great changes in music education in the United States.” (Myers & Brooks, 2002, p. 909).

Although at the Yale Seminar the Music Educators National Conference (MENC) held only observer status, this changed in 1967 with a large grant from the Ford Foundation. In the 1976 issue of the *College Music Symposium*, Charles Fowler wrote about new trends in arts education, including collaboration across arts disciplines, infusion of arts into traditionally core subjects, and a greater acceptance of arts into the broader curriculum (Fowler, 1976,).

Unfortunately, these times were short-lived. As the 60s ended, funding became scarcer for the AHP. “By 1970 substantial dollars were being transferred from the AHP to the NEA. Between 1970 and 1976, AHP funds were used to support IMPACT, the Artists-in-Schools Program (Myers & Brooks, 2002, p. 910). For a time, private sector organizations helped meet the need. As example, the John D. Rockefeller Arts-in-Education fund, administered by Kathryn Bloom (one of the originators of the AHP) provided support from 1968 until 1979 (Myers & Brooks, 2002, p. 910).

“In 1974, AHP was deactivated, and in 1975 it became the Arts and Humanities Staff” (Myers & Brooks, 2002, p. 910). Reasons for the AHP’s demise were varied. “Though the four major arts education professional organizations in theater, dance, visual arts and music had cooperated, along with the AHP, in the founding of the Alliance for Arts Education (AAE), declining fiscal support for the AHP and the failure of arts education programs to find common ground resulted in their loss of influence” (Myers & Brooks, 2002, p. 911). The AAE is strongly affiliated today with the Kennedy Center, and though the desire to resurrect the AHP through the AAE is present, a unified vision was not present as late as the 1990s.

The National Endowment for the Arts (NEA), created in 1965, represented a commitment by the federal government to the artistic culture of America. Called the National Foundation on the Arts and Humanities Act, this bill created the NEA and the National Endowment for the Humanities (NEH). The NEA has had a relationship with arts education since its inception, most consistently through its artist residency program in schools. In the beginning, the NEA worked within the education system, placing poets in schools almost immediately. These efforts expanded to new areas during the 1960s.

“In 1969-70, the USOE transferred a million dollars to the NEA to support AIS (changed to Arts-In-Education in 1980), the largest federally funded program for arts education in U.S. Schools. By 1972, at a cost of approximately 1.5 million, the NEA was placing hundreds of artists who represented all arts categories in the nation’s schools. In 1974, the expenditure was over \$3 million” (Myers & Brooks, 2002, p. 911). Unfortunately, the NEA’s role in schools was limited to providing artist residencies and, as with the AHP, music education associations were not included in the inception or implementation of the federal government’s efforts to bolster the arts in the United States. While supportive of the legislation and the continuation of funding, the



NEA and the AHP served to augment arts education from outside the school rather than directly benefit teachers on a day to day basis. Decision making for these institutions was maintained at the state and federal level, while education became increasingly under local control. This model of separating funded arts education programs from actual arts educators presented a serious problem for arts education professionals in the country. “Orchestras have tended to enter the education field with little understanding of the psychological processes involved, and often their motives have had little to do with effectively encouraging a genuine involvement in music by young people” (Hart, 1973, p. 27).

In 1977, an association of National Arts Education Organizers worked to create a federally sponsored National Institute of Arts Education. Their report was submitted under record in the Senate Committee on Human Resources, Subcommittee on Education, Arts and Humanities. John J. Mahlmann, president of MENC at the time, stated that professional arts educators had no role in the development of arts education plans (Myers & Brooks, 2002, p. 913). His objections to the then current policies of the NEA and the federal government’s attitude toward the role of arts educators would change the landscape of the NEA in the 1980s.

In 1986, the NEA was redefined as a collaboration of arts professionals and arts education professionals. Per the briefing paper released with the new NEA: “Arts teachers and their organizations must do their parts to ensure that this tremendous effort of will at the federal level is not vitiated by neglect; cynicism; petty arguments; or failure to link study and practice, the world of art, and civilization in state and local promotions of arts education” (New NEA, 1986, pp. 25-26).

The new NEA attempted to bridge the gap between artists and art educators and offered a way for the groups to work hand in hand in maintaining arts education. In addition, new terms,

used as early as the 1960s when the MENC and other organizations began to promote a more comprehensive, conceptually based music curriculum, became part of the new NEA act (Myers & Brooks, 2002, p. 911).

As funding began to diminish, the NEA sought to continue partnerships through private foundations. For example, large corporations began soliciting proposals for projects that involved partnerships between arts organizations and schools. As these types of grants came in, it became apparent that those proposing to spend the money were more interested in partnerships than outright funding of arts education. “Both nationally and locally, *partnership* became a key word in the effort to reinstate abandoned arts programs or to develop expanded arts education opportunities” (Myers & Brooks, 2002, p. 921).

## **FUNDING FOR ARTS OUTREACH**

According to Myers, funding for outreach programs is of two types, hard or soft money, depending on the focus of the funding. If the focus is on artists, the money is not intended for a recurring use over a long period. Symphony musicians who visit a local school to perform is an example of a soft money, artist-centered approach. If the focus is on hard money then it is on “an ongoing, budgeted commitment to education, in which an arts curriculum is not presented as a special event but as a part of a continuing commitment to learning” (Myers & Brooks, 2002, p. 918). In terms of how partnerships function between orchestras, communities, and schools, the type of focus, artist-centered or arts education-centered, is determined largely by funding. Hard money funding is crucial to the success of a curriculum-based arts partnership. Often, these funding sources, both soft and hard, are viable ways for an orchestra to increase its budget. Philip

Hart, writing in the *Music Educator's Journal* in 1973, wrote a scathing review of the status of educational outreach by American symphony orchestras.

Mounting financial problems have caused orchestras to turn increasingly to youth concerts as both a direct and an indirect source of income. In fund-raising efforts, many orchestras use their “educational” programs as powerful selling points. Moreover, now that government funding of the arts has assumed increasing importance, orchestras have used their educational projects to secure public aid. Many of the methods employed in these projects, however, would not survive an intensive examination by professional educators. Orchestra sponsors, private donors, and government agencies have been all too prone to think that well-intentioned but poorly conceived projects are meritorious as long as they carry the educational label (p.28)

In 2007, the League of American Orchestras partnered with the National Association for Music Education (NAfME) and the National Guild of Community Schools for the Arts to propose a document favoring classroom music. To date, the document has been endorsed by more than 240 orchestras. The document, entitled *Orchestras Support In-School Music Education*, lists four ways orchestras can further their outreach and be more of a positive presence in the curriculum (Rosen and Noonan 2012). The steps are:

- Ensuring that music education advocacy is a role for everyone in the orchestra family—staff, musicians, trustees, volunteers, and our audiences.
- Advocating for policies that support the presence of in-school music educators and demonstrably improve access to high-quality music education for all students.
- Proactively forming sustainable advocacy relationships with school partners, policy leaders, and community stakeholders to secure the success of every child’s music education.
- Participating in forums where local, state, and national education policies are determined by listening to community needs and communicating the benefits of systemic K-12 music education (p. 17).

## **ARTS PARTNERSHIPS**

There is not a wealth of research on arts partnerships or educational outreach by symphony orchestras. A report by Hill and Thompson (1968) commissioned by the American University in Washington D.C., lists amounts of money donated by orchestra administrations to support youth concerts. Author Willian Hill comments, “In spite of the scope of youth concert operations, the millions of children involved, the time, effort and money invested-the underlying philosophies of youth concerts, the practices involved in their presentation and incorporation into music education curriculums had not been subjected to comprehensive analysis prior to this

study” (Hill and Thompson, 1968, p. 1). Aside from the extensive work by David Myers in *Beyond Tradition: Partnerships Among Orchestras, Schools, and Communities* (1996) and his contribution to the *New Handbook on Music Teaching and Learning* (2002), there are reports prepared by the League of American Orchestras (LOAO) that focus on the amount of money in an orchestra’s budget and where it is directed. The clear majority of publications on educational outreach are found in local or national periodicals or press releases that detail a singular event.

## **PARTNERSHIPS: STUDENTS TO ARTISTS**

One of the ways that outreach took shape in the relationship between schools and arts organizations was through Artists in the Schools programs. Usually, this outreach took the form of short or long-term residencies, during which artists presented an on-site concert, conducted a masterclass on an appropriate subject, or gave a lecture on their career perspectives. Historically, these visits, which still continue, became part of the outreach system during the educational reform period of the early 1960s. Such residencies are particularly effective in rural areas, although the parameters are often determined by funding rather than instructional needs.

Mandatory outreach is a problem for symphony artists, as some are less suited to education than others. “Though artist residencies have existed for over three decades, the function of artists in schools relative to the curriculum has never been entirely clear” (Myers & Brooks, 2002, p. 920). Whether artists are in schools primarily to practice art or to serve as arts teachers continues to be questioned. Louie Suthers, Maquarie University in Australia, expresses it well: “The image of a symphony concert is that of a formal occasion: well-dressed patrons in well-appointed venues listening attentively to programs of classical music, applauding them as etiquette demands and enjoying a drink with friends at an interval--not an environment designed

to cater for the needs of young children” (Suthers, 2008, p. 50). This does not mean that the concert hall is not the place for excellent outreach, only that it needs to be well planned.

Orchestral organizations have many ways to make a trip to the concert hall enjoyable and memorable. *Peter and the Wolf*, a narrated piece for children by Prokofiev, and the early children’s concerts by Leonard Bernstein are two pre-1996 examples. After the Myers Report, many works appealing to children began to be performed at local symphony halls. *The Composer Is Dead* is an example of a work which functions well in symphony partnerships, especially when paired with lesson plans. Lemony Snicket (aka Daniel Handler), the children’s author, along with composer Nathaniel Stookey, is responsible for *The Composer is Dead*, one of the more successful new works for children’s concert. The pair were first involved with Handler’s reading of *Peter and the Wolf*, which Handler changed “pretty extensively, making it very Snicket-y” (Corbett, 2008, para.8). This worked so well that “the symphony then commissioned the pair to write a new musical work, with narration” (Corbett, 2008, para.8). Since its premiere in July 2006, more than 40 symphonies have performed Stookey’s work, with Handler performing the Inspector role a dozen times. This work, much like *Peter and the Wolf*, is performed for children in many orchestras across the country. The attractiveness of these works lies in highlighting individual instruments, which suggests lesson plans on the aural differences between instruments. In addition, the spotlight on individual musicians makes the concerts more interactive.

Another example of partnership is the Link Up program, which began at Carnegie Hall. In this program, orchestras apply to be partners and gain use of the Carnegie Hall Corporation teaching materials:

- Link Up curriculum guides for each teacher (featuring lessons on singing, playing the soprano recorder or violin, reading and notating music, and composing and improvising music) with accompanying CD and DVD
- Link Up workbooks for each student
- Professional development resources and webinar for lead teachers and orchestra administrators
- Orchestral scores and parts for most pieces, concert script, and concert visuals
- Carnegie Hall's online resources including additional lessons and classroom resources
- Carnegie Hall brand guidelines, fundraising templates, and public relations resources
- Ongoing support and consultation regarding professional development for teachers, program implementation, and media/publicity planning (Carnegie Hall Corporation, 2017)

In turn, the partnership organization provides the following:

- Culminating interactive concert(s) featuring an orchestra, conductor, and participating Link Up students
- Recruitment of local teachers and students for participation
- Professional development workshop(s) and direct support for participating local teachers
- Soprano recorders for all participants, as needed
- Program-related needs, both artistic and administrative
- Ongoing communication with Carnegie Hall regarding program implementation (Carnegie Hall Corporation, 2017)

Currently, the Link Up program has almost a hundred partnership organizations from around the world, making it one of the most popular partnership programs in existence. There are four types of concert in the current rotation, *The Orchestra Rocks*, *The Orchestra Sings*, *The Orchestra Swings*, and *The Orchestra Moves*. Students following the curriculum learn selected parts of the music on soprano recorders and perform with the orchestra from the audience seats at their local symphony hall.

In 2012, the North Mississippi Symphony Orchestra (NMSO) performed a Link Up concert at a civic auditorium in Tupelo, MS. “Elementary students from Tupelo, Lee County, Pontotoc City and Pontotoc County school districts not only listened to the orchestra, but also played recorders or sang along” (Kieffer, 2012, para. 34). The NMSO included many groups from the local music community in the event, displaying the flexibility of the Link Up program. “Fifth graders will play recorders, second graders will sing, and they'll all perform with the Tupelo Symphony Orchestra, Itawamba Community College's drumline and famous violinist Alexander Markov” (Kieffer, 2012, para. 3).

In a 2008 study, educators interviewed by Louie Suthers at Macquarie University, Australia, confirmed that children need to interact with the performers. “[Live] concerts can open their eyes and ears to other experiences of music, other types of music; to something that goes beyond what we can provide during the course of music in our playroom program (Suthers, 2008, p. 51). In terms of how the concert should run and the goals for the event, the teachers interviewed by Suthers agreed that live performance was best, and that the concert needs to be engaging but not overly long. “In all concerts, the children in the audience were fascinated by the musicians playing instruments. It was clear that they were particularly responsive to the parts of the concert



where the musicians left the performing area and interacted directly with them” (Suthers, 2008, p. 51).

In 1997, the Boston Symphony used a format similar to the example above, with an added twist: having experienced well-planned classroom lessons, students would come to the concert prepared to listen. The administrator of education and community programs headed the project, using Stravinsky’s *Firebird Suite* as the featured work. The audience was comprised of grades 4-8. In addition to the music, an “on stage” puppet show depicted the story. Plans for this large-scale project (February, 1998) included teacher training for 125 teachers, handbooks referencing music and art for general elementary teachers, and two *Firebird* “resource trunks,” the contents of which were displayed and demonstrated for the teachers at the workshop. The trunks contained a variety of materials, gathered from toy stores, bookstores, craft shops, libraries, and a New York Ballet shop, which could be used by the teachers to enhance their lessons. “Children whose schedules included music gathered around the resource trunk and video screen, putting on costumes, stepping onto painted foot positions for ballet steps, and seeing and hearing the Dance Theater of Harlem’s performance of *The Firebird*” (Roebuck, 1999, p. 34).

## **PARTNERSHIPS: ARTISTS TO STUDENTS**

Often, orchestral organizations are driven to take their music to the students, rather than have them come to the concert hall. These performances usually do not follow the traditional format of a symphony concert. Brandon, a musician who performs in day-care centers in his native Australia, focuses on what works for students. “We want to excite a response in our audiences, not just have children sit and be passive” (Suthers, 2008, p. 52). A 2008 Australian

study by Suthers, who interviewed the daycare worker above, reported that early childhood staffs found their choice of concert venues influenced by financial constraints, licensing regulations, and the respective program's educational aims. For some there were advantages to having performances in their center rather than traveling to a venue elsewhere; usual routines could be maintained and the children tended to be more relaxed and settled in familiar surroundings (Suthers, 2008, p. 54).

While there are popular student-to-artist programs that are duplicated across the world, many artist-to-student programs are created in house by the community, outreach, or education staff of a symphony orchestra. The Billings Symphony Orchestra received a \$30,000 grant from the Tippet Rise Fund of the Sidney E. Frank Foundation for outreach. In Montana, one of the least populated states in the country, the Symphony is surrounded by rural and remote areas. Explore Music!, the education and community engagement program of the Billings Symphony Orchestra and Chorale (BSO&C), was created to assist in sharing symphonic music with as many people as possible and cultivating lifelong appreciation of the performing arts. The program was designed to reach more than 40,000 children, youth, adults, and seniors each year and support in-school concerts, Rural Rhythms concerts, visits from symphony musicians to local schools, and a Billings Symphony Orchestra concert at Columbus (Montana) High School (Webb, 2013).

Not all artist-to-student outreach grants are privately funded. In Australia, the Canberra Symphony, which receives far more federal funding than orchestras in the U.S., realized a \$100,000 addition to their budget. The press announcement read, "As part of the funding, one of the most exciting initiatives is that we'll be able to continue to expand the outreach program,

which brings ensembles from the Canberra Symphony Orchestra into the community and into the special education programs of various special schools” (Mosley, 2013, para. 4).

Sometimes the desire for an outreach program is present, but the funding is not. In 2008, the Virginia Symphony, needing more funds to meet its budget, wanted to create a Community Engagement Program (CEP) modeled after one offered by the St. Louis Symphony Orchestra, but there was no budget to begin. The director came up with a bold scheme: “I asked the musicians to give the organization a loan in the amount of two weeks’ pay” she said. “A lot of the old hands expected never to see that money again, but they voted for it. Not only did we pay them back, but we were able to balance the budget that year” (“Symphony Spotlight,” 2008, p. 8). In the case of the Virginia Symphony, outreach was used along with traditional means to get the business of the orchestra back in shape. One of the benefits of the program, which differs from many outreach programs in symphony orchestras, is that participation is optional. “The optional nature of the program is ideal, because no one ever feels as if they are forced to be there. This results in a better end product for the community in which the musicians serve” (“Symphony Spotlight,” 2008, p. 8).

The London Symphony Orchestra (LSO) partnered with the area Local Authorities Music Services and musicians of the LSO to help teachers with music-specific lesson plans and cross curricular uses of music. The confidence of the teachers involved in the program, which was directed at very young classrooms, was markedly increased in their music teaching abilities as a result of their training with professional musicians. The Boston Symphony’s program, mentioned above, also had teacher training as a component, but in that case the teachers came to the musicians.

## **PARTNERSHIPS: MINORITIES OR THE UNDERPRIVILEGED**

For some orchestras, outreach and education programs are a mechanism to provide access to students normally disenfranchised from the classical world. In Atlanta, the Talent Development Program (TDP), a training program developed for talented junior high school musicians from the inner city, has been formed. The program allows the students to study with ASO members for two years. TDP students give recitals regularly, which helps to spur donations for the program. In addition, these students have access to the Atlanta Symphony Youth Orchestra. “The goal is to develop young black musicians able to compete for a spot in the excellent Atlanta Symphony Youth Orchestra” (Henry, 1995, p. 6). Ramnarine (2011) summarizes, “In reaching out to new communities, symphony orchestras have become aware of issues around inclusivity and social relevance as they strive for the renewal of the western symphonic tradition.” (p. 327).

This effort also occurs in other countries. “Another example has come from Jose Antonio Abreu’s vision of ‘art’ being available to deprived communities in Venezuela through a network of youth orchestras and music education centers implemented in 1975” (Ramnarine, 2011, p. 327). El Sistema, the government funded program in Venezuela, now has affiliated groups worldwide, with hundreds in the United States, and was the subject of a special on the television news magazine *60 Minutes*. The original El Sistema contains programs that reach into adulthood, and as older professional musicians help the younger groups, this is the form of outreach most prevalent in that country. El Sistema groups in the United States are separate from major orchestras and perform fantastic outreach in a non-traditional partnership. “Orchestras in Brazil have become well-known for promoting symphonic repertoires in social projects” (Ramnarine, 2011, p. 327). As Brazil’s urban centers are rife with poverty-stricken areas, this presents a large

new audience for these performing groups. These new audiences come from a variety of backgrounds, and are reached through a large commitment from the governments of these countries. The Sao Paulo Orchestra has dedicated itself to these types of outreach. “One result of widespread attention to the social project of El Sistema has been to draw orchestral attention to poverty” (Ramnarine, 2011, p. 327).

## **PARTNERSHIPS; SIDE-BY-SIDE CONCERTS**

Another way orchestras promote outreach goals is through side-by-side concerts. In side-by-side concerts, students who know how to perform on instruments come to the symphony hall and perform with the local professional orchestra. These experiences can be monumentally impactful for students who have already demonstrated a passion and devotion to the musical arts.

In 1995, the Atlanta Symphony Orchestra hosted an event giving all ages an opportunity to explore orchestral instruments. “An all-day open house in November attracted some 6,000 patrons, from toddlers to centenarians, eager to hear the free concerts (Levi conducted three of them), to participate in a sing-a-long with the ASO under Robert Shaw, and to attend lecture-demonstrations on conducting, composing, and listening” (Henry, 1995, p. 6). Vanloads of children arrived with their parents to bow, blow, beat, and strum the full panoply of instruments, guided by ASO musicians. Those musicians, touched by such direct contact with their public, expressed a desire to make this an annual happening. All concurred. “In an attempt to reach younger audiences on their own turf, ASO marketing director Elaine Powell-Cook has overseen the development of a local television campaign, with two artfully produced 30-second spots airing on MTV, Headline News, and the A&E cable networks” (Henry, 1995, p. 6).

In Michigan, the Grand Rapids Symphony Orchestra received funding from the Grand Haven Community Foundation in 2013 for outreach, and it was decided to have a side-by-side concert on stage with high school students. The objective was to give students, who possessed some level of technical skill, a close look at the habits and abilities of seasoned professionals. According to the *Grand Haven Tribune*, which carried the story, the concert provided “select high school orchestra students with the opportunity to perform with the symphony in a concert at their school, meet symphony musicians, pick up tips of the trade, and prepare and perform the same repertoire as the professionals” (Tribune Staff, 2013, para. 3). The concert is now a yearly event hosted by the symphony with a specific school. A competitive process is used to select two or three high school orchestras for participation in the program.

In 2008, this model was taken to the extreme by the Christchurch Symphony Orchestra (CSO) in New Zealand. “Conductor Hamish McKeich yesterday led the 450-strong orchestra of students and professionals in a rehearsal, pictured, just hours ahead of the gala concert. CSO musicians performed alongside students from 16 Christchurch high schools and the Christchurch School of Music” (Massed School, 2008, A5). According to Celia Steward, CSO outreach and education coordinator, the sound of 450 musicians playing together was “incredible, amazing and spine-tingling” (Massed School, 2008, A5).

## **COMMUNITY EVENTS AS OUTREACH**

Certain types of community events can also function as outreach. In 2011, Tina Ranmarie, professor of music at Royal Holloway University of London, published an article in the *Ethnomusicology Forum* on community outreach by UK orchestras. Using cultural music to

educate a mostly immigrant population about the western orchestra is one way that a community event can be used as outreach to a segment of the population. These events can be funded through interest organizations affiliated with the immigrant population. As example, in the UK, the City of Birmingham Orchestra gave concerts in 2009 in Birmingham and London for a primarily South Asian audience. The event featured the music of “Nusrat Fateh Ali Khan (1948-1997) [who] was a renowned *qawwali* singer who helped introduce this mystical Sufi tradition from Pakistan and India to a global audience” (Ramnarine, 2011, p. 335). The orchestra expanded the concert in London, adding a tabla to create a more authentic sound. The “audience members (who were primarily South Asian) participated in hand-clapping, especially audible indicating approval at the start of familiar songs” (Ramnarine, 2011, 335). The same article reported the London Symphony Orchestra’s outreach to their large South Asian population via gamelan concerts. The LSO is cited as a “community resource,” which “offers workshops to local schools (to which all have been invited), and commissions compositions for gamelan and symphony orchestra players” (Ramnarine, 2011, 339).

## CONCLUSION

While the status of outreach has flexed with changing budgets, the basic formats have not changed over the last fifty years. Some students come to artists and some artists visit students. Orchestras see outreach as a way to increase donorship and audiences; schools see these artists as extra help instead of additional educators. Large associations and groups fund artists as special guests in the classroom, but are reluctant to enter long term relationships with specific schools, with the exception of honor groups or specially-designed programs. The repertoire used by modern symphony orchestras varies as well. There are programs such as Snicket’s *The*

*Composer Is Dead* and more traditional compositions like Prokofiev's *Peter and the Wolf*, that can be performed in any location and matched up with lesson plans in any concert setting.



## CHAPTER 3

### METHODOLOGY

#### INTRODUCTION

Because this work is centered around updating the 1996 Myers Report, the format for collecting, interpreting, and displaying data was borrowed heavily from the original study. The goal of the present research was twofold: to compile a snapshot of the last twenty years in partnerships using data from the LOAO, which was used in the original report, and to reconnect with the nine orchestras originally listed in the report. Through these processes, a picture of current trends in partnerships with orchestras from a macro perspective (budgets and allocations, number of staff members, and so forth from the LOAO), and a micro perspective (individual orchestras and their development over the last twenty years) can be reached.

#### APPROACH

##### LOAO SURVEYS

Each year, the LOAO sends out surveys to each of its member organizations, which are separated into groups based on size and budget. Group 1 contains major orchestras like the New York Philharmonic, Boston Symphony, Chicago Symphony and the Atlanta Symphony. Group 2 is made up of slightly smaller groups like the Florida Orchestra or the Virginia Symphony, and so on. According to the 2005 survey, responses were placed into three Classes: Group 1, with budgets greater than \$13.8 million, Groups 2-4, with budgets from \$1.7 million to \$13.7 million,

and Groups 5-8, with budgets less than \$1.7 million. This makes the surveys very helpful in understanding how organizations across the country with a variety of missions, sizes, and budgets handle education, outreach, and partnership. Many of the questions in the surveys have been included in LOAO surveys since the mid-1940s; however, this dissertation is concerned only with the Education and Community Engagement survey results from the publication of the original report in 1996 and onward.

The surveys are divided into four sections: Finance and Structure; Programs; Statistics and Demographics; and General Questions. The Finance and Structure section concerns the allocation of funds, the types of departments that oversee Community Relations, how many personnel are in these departments (both full and part time), total budget expenses for these areas, how services are handled in the musicians' contracts, and where the money for these programs is represented in the income side of the organization's budget.

The Programs section lists the many types of outreach programs available. In 2005, the list included the following options in the survey: youth orchestra, music-learning center, pre-service training for classroom teachers, pre-service training for music teachers, in-service training for classroom teachers, in-service training for music teachers, in-school residencies, assembly programs, master classes, elementary school programs, middle school programs, high school programs, college-level programs, continuing education programs, pre-concert programs, run-out youth concerts, composition workshops, work with other cultural/ed organizations, in-school chamber/ensemble concerts, in-school full orchestra concerts, hall youth/family concerts, hall school concerts, work with community music school, instrumental training, long-term partnerships, in-school workshops/coaching, pre-school programs, special education programs, adopt-a-school, school-to-work, internships, competitions, community chorus programs,

community orchestra programs, programs at religious institutions, programs at community facilities, small ensembles in community, orchestra concerts in community, work with other community arts, and other.

The Statistics and Demographics section deals with the number of community members served and their demographic makeup. The surveys split community members into age groups based largely on school categories: Pre-, Elementary, Middle, and High School, along with College/Grad School, Adult, Music Teacher, and Classroom Teacher.

Finally, General Questions solicits information about evaluative processes, funding request types, and how musicians are paid for their time. Evaluation percentages for all the Classes in the programs section are listed, along with types of evaluation and program alignment with educational standards. Finally, musician professional development, funding advocacy for music education, and coalitions with other arts and education organizations round out the final questions.

These surveys are often difficult to design, as each orchestra operates with varying goals and missions, and are often organized in very different ways. A community orchestra in New York City has a very different organizational structure from a salaried one in Billings, Montana. Many questions in the survey are open-ended, which “permit[s] orchestras to describe unique features of their programs. Many orchestras responded to this item with detailed descriptions and examples of materials indicating strong education efforts” (Myers & Thomas, 1996, p.21).

To gather the survey data for the present study, survey data were requested from the Research and Education Division of the LOAO for a range of years. Permission was given to use only the publicly available data posted on the LOAO website. At the time the research began, data from 2001, 2005, and 2008 were available online; data from the 2017 survey were

subsequently posted. It was decided to use the 2001, 2005, and 2008 data for the longitudinal study of the two decades following the publication of the original report. The 2017 survey was not used because it provided no data sets that were comparable with the earlier surveys.

Because the LOAO surveys are designed to assess current conditions rather than changes over time, it was necessary to correlate survey questions carefully across years. The 21<sup>st</sup> century LOAO surveys were compared with the Myers Report to eliminate any categories of data not included in the Myers report. The data that were included were broken into sections on K-12 Orchestra Education Programs, Education Committees, Goals and Objectives of Education Programs, Formalized Partnerships, Professional Consultants, Financial Support and Program Administration, Program Effectiveness, and Reflections of Survey Findings. There were also diagrams on Target Population, Committee Members, Evaluation Methods, and Effectiveness Factors. A Chi-square test was performed on the LOAO data to identify any significant changes over time, yielding a P-value. Any P-Value that is 0.01 or less was judged to be statistically significant.

## SITE VISIT UPDATES

For the Myers Report, site visits were conducted with nine orchestras to get a better understanding of how they structured partnerships in their organization. These ensembles were chosen because of their history of strong partnerships with schools and their communities, their commitment to outreach, and their willingness to respond to correspondence and host a site visit. Visits followed similar procedures and covered the following topics: Overview, Program Concept, Goals and Objectives, Program Planning and Implementation, Program Support,

Assessment and Evaluation, Impact, and a final section called the Coda, for any additional thoughts or observations (p. 27).

To update this section of the Myers Report, each of the original nine orchestras was contacted. First, an email was sent to the education or outreach director (See Appendix A). The email outlined the basic idea of the research and requested assistance. Second, a follow-up email containing five questions to be answered was sent to each of the nine outreach directors. As the questions pertained only to the subjects' knowledge of their workplace and did not solicit personal information or opinions outside a professional capacity, Institutional Review Board (IRB) approval was not necessary. The questions were as follows.

1. Briefly outline the history of your position over the last twenty years. How many people have served in this capacity in that time?
2. Were you aware of the Myers Report, is there a copy in your organization that you were aware of, and are you aware of any impact the report may have had on outreach in your organization?
3. In what way has outreach changed in your organization in recent memory? Do you anticipate its place in the overall organization increasing or decreasing?
4. In your opinion, what are the major factors, particular to your organization, that limit or aid in the status of outreach?
5. What evaluative process do you use to determine the viability of an outreach program?  
How do you decide which programs to choose for the next cycle?

The goal of these questions was twofold: first, to update each orchestra's progress in education, outreach, or community development; and second, to gather information about the

effectiveness of the original report. After a response was received from an organization, a follow- up email was sent to clarify any points that needed further explanation.

As this was qualitative data, no testing was used to check for significance. The new information was reported and compiled for each organization and compared to the answers from the previous report. In addition, it is important to note that this research was done completely independently of the LOAO and its staff.

## CHAPTER 4

### DATA PREPARATION

#### INTRODUCTION

The Myers Report relied on two main sources of data: the pre-1996 LOAO Surveys, which were used to explain trends in spending and organization among LOAO members; and findings from on-site visits with nine LOAO orchestras. The LOAO questionnaires produced largely quantitative data. Such surveys can be difficult to design and interpret, as member organizations have their own goals and missions, and are often organized in very different ways. In contrast, many of the questions in the Myers on-site survey were open ended, which “permitted orchestras to describe unique features of their program. Many orchestras responded . . . with detailed descriptions and examples of materials indicating strong education effort.” (Myers & Thomas, 1996, p. 136). Thus, the two sources produced very different types of data.

To gain an understanding of how educational outreach has changed since the Myers report was issued, the present study uses survey data collected by the LOAO since 1996. The data have been compiled and examined in an effort to connect current trends with those identified twenty years ago. As a counterpart to Myers’ site visits, a researcher-designed set of open-ended questions, based on materials used in the original site visits, was sent to the same participants via email. After follow-up contact, responses were received from five orchestras.

## SURVEY FINDINGS

Because the Myers survey was never repeated, longitudinal data for the present study were drawn from LOAO surveys conducted after the publication of the Myers Report. Findings from LOAO surveys conducted in 2001, 2005, 2008, and 2017, were released and are available on the internet. Although the researcher requested additional resources and findings, the LOAO refused to release any information beyond what was available on their website. (In 2014, a report called *Orchestra Facts: 2006-2014: A Study of Orchestra Finances and Operations*, Commissioned by the League of American Orchestras was produced, which contains some basic summary information separate from the LOAO surveys.) The 2017 survey, collected by a third-party company, shares no comparable data sets with the previous reports and is therefore not included in these findings.

For this study, LOAO survey responses were based on two factors: the question number and the size of the orchestra. The questions in the 2001, 2005 and 2008 surveys are not identical; additional questions were included in each subsequent survey, and some questions in the 2001 survey were not included in 2005 and 2008. In addition, some questions required multiple responses, some of which were comparable across years, while others were not. For this reason, the survey questions were coded by number, with multiple parts recognized (1, 1a, 1b, etc.). Responses were also coded by orchestra size, as follows. The LOAO groups its member organizations based on yearly budget. Group 1 includes orchestras with total expense budgets of \$12.5 million or greater; Groups 2-4, between \$1.5 million and \$12.6 million; Groups 5-8, less than \$1.5 million. For simplicity, in this study, Group 1 has been designated Class 1 (C1); Groups 2-4, Class 2 (C2); and Groups 5-8, Class 3 (C3). All questions and the question codes generated



for comparisons across different surveys are located in Appendix B.). The number of respondents for each survey is presented by survey year and size class in Table 1.

**Table 1 – Number of Responding Orchestras to LOAO Surveys by Year and Class Size**

<b>YEAR</b>	<b>CLASS 1</b>	<b>CLASS 2</b>	<b>CLASS 3</b>
<b>2001</b>	12	29	80
<b>2005</b>	12	32	65
<b>2008</b>	8	25	66
<b>POPULATION</b>	<b>27</b>	<b>85</b>	<b>406</b>

For example, the first section, which deals with the staff for ed/comm relations operations within an organization, is worded in the following way:

1. Are the education and community relations activities at your orchestra one department, or two or more distinct departments?
- 1b. If more than one department, please indicate which departments are involved.
  - Education
  - Marketing
  - Community Relations
  - Operations
  - Other

The first question results in a binary answer. Organizations have one of two choices to make. However, when the data are examined, the numbers do not always add up. For this particular question in the 2001 survey, 6 respondents from C1 stated that their ed/comm activities were in one department, and 6 stated it was in two or more departments. As there were 12 total responses from C1 for this year, that question adds up. For C2, there were 20 organizations that stated the one-department answer, and 7 that gave the two-or-more-department answer, but there were 29 respondents for C2 for this year. For the options above, each option

(Education, Marketing, and so on) were treated as separate items to be compared within each class across survey years and within each survey across different classes. In other questions, the average budget for ed/comm activities was given for each class. As these were averages without raw numbers, comparisons between classes or years is impossible. These discrepancies made it difficult to accurately determine which of these questions were statistically significant. After removing all questions that were either non-binary or incomparable, there were 43 questions or items from all three surveys that could be compared and tested for significance. Additional sections added in 2005 and 2008 for types of outreach garnered an additional 66 questions or items for comparison.

Within the constraints of the material available from the LOAO, every effort was made to make comparisons where possible. Again, for the purposes of updating the state of educational outreach, the most prevalent data sets are included in this study. The full surveys and results are available on the LOAO website

### **COMPARABLE DATA SETS FROM 2001, 2005, AND 2008**

The 43 items that can be compared from all three surveys are listed in Table 2. To assure that the same questions were tabulated from each survey, each question was given a question ID number. Respondents are identified by survey year and size class (e.g., 2001\_C1 indicates Class 1 respondents to the 2001 survey).

**Table 2 – Respondent entries for 2001, 2005, and 2008 surveys that are testable.**

Qid	Question	2001_C1	2001_C2	2001_C3	2005_C1	2005_C2	2005_C3	2008_C1	2008_C2	2008_C3
	Total Respondents	12	29	80	12	32	65	8	25	66
1.1	One Department	6	20	50	8	25	47	2	8	22
1.2	Two or more Dept	6	7	25	3	6	16	3	10	19
1.5	Education	6	7	23	4	8	13	3	10	18
1.6	Marketing	1	4	16	1	3	12	3	7	9
1.7	Community Relations	5	5	5	3	1	5	1	5	7
1.8	Operations	2	6	4	1	3	6	1	9	10
1.9	Other	0	0	0	1	2	6	3	5	8
3.2	Musicians' Salaries/Payroll for youth concerts included in ed/comm budget	4	10	43	5	18	40	1	9	26
3.3	Ed. Services at Red. Rate	5	6	16	5	5	17	2	3	12
4.1	Separate Endowment	5	6	12	6	7	9	2	4	5
6.1	Ticket Revenue Program	11	10	38	12	24	25	4	15	18
7.01	Youth Orchestra	5	16	27	4	15	25	2	9	16
7.02	Music Learning Center	1	3	3	1	1	1	0	0	0
7.03	Pre-Service Training for classroom Teachers	10	14	10	3	6	3	1	2	4
7.07	In-School Residencies	9	13	10	8	17	12	4	9	11
7.08	Assembly Programs	6	17	24	7	21	19	1	7	16
7.09	Master Classes	10	21	32	11	28	35	4	11	20
7.1	Elementary School Programs	12	26	52	11	32	42	3	15	25

7.11	High School Programs	12	19	21	10	25	20	4	12	17
7.12	Continuing Education Programs	6	7	7	7	14	14	4	12	7
7.13	Pre-Concert Programs	12	28	59	11	32	39	4	17	29
7.14	Run Out Youth Concerts	8	13	17	5	15	14	1	7	5
7.15	Composition Workshops	7	7	4	6	7	6	3	5	4
7.16	Collaborations w other groups	12	20	39	11	31	45	3	13	24
7.18	Full orch concerts in school	3	7	16	3	9	5	1	6	10
7.19	Music School	1	3	5	9	14	17	1	5	5
7.2	Instrumental Training	5	13	18	6	14	9	3	7	6
7.22	Long Term Partnerships	10	19	22	12	21	18	4	10	10
7.23	In School Workshops/Coaching	10	16	14	11	22	12	4	7	7
7.24	Pre-School Programs	9	16	12	9	21	9	1	4	4
7.25	Middle School Programs	11	19	19	11	29	28	4	13	17
7.26	College Programs	9	9	7	7	13	18	2	5	7
7.27	Special Education Programs	2	2	7	3	5	2	0	2	2
7.28	School Concerts in your hall	12	24	39	11	30	39	4	14	17
7.3	Competitions	8	16	37	8	25	29	3	11	25
7.35	Youth/Family Con in hall	12	18	44	11	29	41	4	13	18
7.37	Other	6	12	13	2	5	5	1	4	7

7.39	Programs at Religious Institutions	9	20	29	6	10	10	3	2	2
7.43	Community Perf by Small Ens.	10	23	48	9	23	32	3	11	20
7.45	Community Perf by Orch	8	15	32	11	25	37	4	13	19
7.47	Community Chorus Programs	9	17	47	5	9	8	1	3	10
7.48	Community Orchestra Programs	4	3	11	1	1	8	0	2	6
7.49	Work with other community arts	9	16	25	6	23	37	3	8	16

## COMPARABLE DATA SETS FROM 2005 AND 2008

As the 2005 and 2008 surveys include data on the evaluation of programs, they are much longer than the 2001 survey and share an additional comparable 66 data sets. Again, these questions were unified across surveys and then the original respondent count was taken with a question whose answer made it possible to determine a response count vs. a respondent count possible (See Table 3).

**Table 3 – Respondent entries for 2005, and 2008 surveys that are testable.**

Qid	Question	2005_C1	2005_C2	2005_C3	2008_C1	2008_C2	2008_C3
	Total Respondents	12	32	65	8	25	66
6.2	Programs rely on Musician Service Exchange?	4	1	0	0	0	1
7.04	Pre-Service Training for music teachers	3	6	4	2	2	4
7.05	In Service Training for classroom teachers	10	10	1	3	1	2
7.06	In Service Training for Music Teachers	9	9	5	4	1	3
7.31	Internships	10	18	22	4	12	13

7.32	Adopt-a-school	3	6	3	1	2	5
7.33	School-to-work	1	1	2	0	0	0
7.36	Programs at Community Facilities	9	23	16	3	11	12
13.01	Eval Own Program	12	30	53	2	13	33
13.02	Eval. Youth Orchestra	1	7	11	1	6	12
13.03	Eval. Music Learning Center	1	0	1	0	0	0
13.04	Eval. Pre-Service Training for classroom Teachers	2	3	4	1	2	2
13.05	Eval. Pre-Service Training for music teachers	2	4	6	1	1	2
13.06	Eval. In Service Training for classroom teachers	7	4	1	2	1	1
13.07	Eval. In Service Training for Music Teachers	6	3	4	2	1	2
13.08	Eval. In-School Residencies	4	13	10	2	6	3
13.09	Eval. Assembly Programs	4	8	9	0	2	6
13.1	Eval. Master Classes	4	5	15	1	1	4
13.11	Eval. Elementary School Programs	9	24	30	2	12	17
13.12	Eval. High School Programs	3	15	13	2	10	8
13.13	Eval. Continuing Education Programs	3	6	3	2	1	3
13.14	Eval. Pre-Concert Programs	3	6	15	1	4	6
13.15	Eval. Run Out Youth Concerts	1	6	4	1	3	1
13.16	Eval. Composition Workshops	4	2	2	0	2	2
13.17	Eval. Collaborations w other groups	3	7	12	1	4	7
13.19	Eval. Full orch concerts in school	2	1	3	1	1	5
13.2	Eval. Comm Music School	1	2	1	0	3	0
13.21	Eval. Instrumental Training	3	6	4	0	1	3
13.22	Eval. Long Term Partnerships	9	11	4	1	3	1
13.23	Eval. In School Workshops/Coaching	6	9	6	1	3	0
13.24	Eval. Pre-School Programs	4	10	1	1	3	1
13.25	Eval. Middle School Programs	6	19	19	2	10	9
13.26	Eval. College Programs	3	4	2	0	2	2
13.27	Eval. Special Education Programs	1	1	1	0	1	0
13.28	Eval. School Concerts in your hall	7	22	26	1	5	9
13.29	Eval. Competitions	2	3	12	1	1	6
13.3	Eval. Internships	5	4	9	2	2	3
13.31	Eval. Adopt-a-school	1	0	1	0	1	0
13.32	Eval. School-to-work	1	1	1	0	0	0

13.34	Eval. Family Concerts in your hall	4	11	21	1	4	10
13.35	Eval. Programs at Community Facilities	5	4	7	1	5	1
13.36	Eval. other	1	1	1	0	2	3
13.37	Eval. Programs at Religious Institutions	3	1	4	1	0	0
13.38	Eval. Community Perf by Small Ens.	5	4	7	1	3	3
13.39	Eval. Community Perf by Orch	5	2	14	1	1	5
13.4	Eval. Community Chorus Programs	1	1	4	0	0	2
13.41	Eval. Community Orchestra Programs	1	0	5	0	0	4
13.42	Eval. Work with other community arts	2	2	14	1	4	6
13.43	Eval. In School Chamber/Ensemble	3	12	19	1	5	6
14.1	Eval In House	8	27	51	2	11	30
14.2	Eval Outsourced	4	3	1	0	2	1
14.3	Use Videotape as a component	5	5	7	0	2	8
15.1	Programs aligned with arts standards - Local	9	16	25	2	5	10
15.2	Programs aligned with arts standards - State	11	24	33	2	10	22
15.3	Programs aligned with arts standards - National	10	19	13	2	8	15
15.4	Programs aligned with academic standards - Local	8	11	23	1	3	11
15.5	Programs aligned with academic standards - State	10	18	22	2	8	16
15.6	Programs aligned with academic standards - National	8	10	8	2	4	8
16.1	Focus - Skills Based	10	24	25	2	10	15
16.2	Focus - Interdisciplinary	11	30	27	2	9	19
16.3	Focus - Aesthetic Ed.	7	25	41	2	8	21
17.1	Professional Development Provided	10	16	7	2	8	9
17.2	Musicians Compensated for Prof Dev Time	7	12	10	2	5	6
18.1	Participates in local coalitia with another arts/ed org.	10	23	36	1	8	22
18.2	Orch advocates locally for in-school music ed	9	25	38	2	8	27
18.3	Orch advocates at state legislature for increase in music ed funding	4	10	15	0	2	13

## PROPORTIONAL REPONSES

Each question was assigned an identification number and values were placed side by side.

As the total number of respondents for each Class and the total number of organizations within

each Class were known, it became possible to calculate the proportion of those who answered the questions in the affirmative versus the total number of respondents. For example, the first question in each of the three surveys is “Are the education and community relations activities at your orchestra one department, or two or more distinct departments?” As 6 of the 12 respondents for Class 1 answered that their activities were covered within one department, that proportion value is .5 (See Tables 4 and 5).

**Table 4– Proportional responses for entries for 2001, 2005, and 2008 surveys that are testable.**

Qid	Item	2001_C1	2001_C2	2001_C3	2005_C1	2005_C2	2005_C3	2008_C1	2008_C2	2008_C3
1.1	One Department	0.500	0.690	0.625	0.667	0.781	0.723	0.250	0.320	0.333
1.2	Two or more Dept	0.500	0.241	0.313	0.250	0.188	0.246	0.375	0.400	0.288
1.5	Education	0.500	0.241	0.288	0.333	0.250	0.200	0.375	0.400	0.273
1.6	Marketing	0.083	0.138	0.200	0.083	0.094	0.185	0.375	0.280	0.136
1.7	Community Relations	0.417	0.172	0.063	0.250	0.031	0.077	0.125	0.200	0.106
1.8	Operations	0.167	0.207	0.050	0.083	0.094	0.092	0.125	0.360	0.152
1.9	Other	0.000	0.000	0.000	0.083	0.063	0.092	0.375	0.200	0.121
3.2	Musicians' Salaries/Payroll for youth concerts included in ed/comm budget	0.333	0.345	0.538	0.417	0.563	0.615	0.125	0.360	0.394
3.3	Ed. Services at Red.Rate	0.417	0.207	0.200	0.417	0.156	0.262	0.250	0.120	0.182
4.1	Separate Endowment	0.417	0.207	0.150	0.500	0.219	0.138	0.250	0.160	0.076
6.1	Ticket Revenue Program	0.917	0.345	0.475	1.000	0.750	0.385	0.500	0.600	0.273
7.01	Youth Orchestra	0.417	0.552	0.338	0.333	0.469	0.385	0.250	0.360	0.242
7.02	Music Learning Center	0.083	0.103	0.038	0.083	0.031	0.015	0.000	0.000	0.000



7.03	Pre-Service Training for classroom Teachers	0.833	0.483	0.125	0.250	0.188	0.046	0.125	0.080	0.061
7.07	In-School Residencies	0.750	0.448	0.125	0.667	0.531	0.185	0.500	0.360	0.167
7.08	Assembly Programs	0.500	0.586	0.300	0.583	0.656	0.292	0.125	0.280	0.242
7.09	Master Classes	0.833	0.724	0.400	0.917	0.875	0.538	0.500	0.440	0.303
7.1	Elementary School Programs	1.000	0.897	0.650	0.917	1.000	0.646	0.375	0.600	0.379
7.11	High School Programs	1.000	0.655	0.263	0.833	0.781	0.308	0.500	0.480	0.258
7.12	Continuing Education Programs	0.500	0.241	0.088	0.583	0.438	0.215	0.500	0.480	0.106
7.13	Pre-Concert Programs	1.000	0.966	0.738	0.917	1.000	0.600	0.500	0.680	0.439
7.14	Run Out Youth Concerts	0.667	0.448	0.213	0.417	0.469	0.215	0.125	0.280	0.076
7.15	Composition Workshops	0.583	0.241	0.050	0.500	0.219	0.092	0.375	0.200	0.061
7.16	Collaborations w other groups	1.000	0.690	0.488	0.917	0.969	0.692	0.375	0.520	0.364
7.18	Full orch concerts in school	0.250	0.241	0.200	0.250	0.281	0.077	0.125	0.240	0.152
7.19	Music School	0.083	0.103	0.063	0.750	0.438	0.262	0.125	0.200	0.076
7.2	Instrumental Training	0.417	0.448	0.225	0.500	0.438	0.138	0.375	0.280	0.091
7.22	Long Term Partnerships	0.833	0.655	0.275	1.000	0.656	0.277	0.500	0.400	0.152
7.23	In School Workshops/Coaching	0.833	0.552	0.175	0.917	0.688	0.185	0.500	0.280	0.106
7.24	Pre-School Programs	0.750	0.552	0.150	0.750	0.656	0.138	0.125	0.160	0.061
7.25	Middle School Programs	0.917	0.655	0.238	0.917	0.906	0.431	0.500	0.520	0.258
7.26	College Programs	0.750	0.310	0.088	0.583	0.406	0.277	0.250	0.200	0.106
7.27	Special Education Programs	0.167	0.069	0.088	0.250	0.156	0.031	0.000	0.080	0.030
7.28	School Concerts in your hall	1.000	0.828	0.488	0.917	0.938	0.600	0.500	0.560	0.258
7.3	Competitions	0.667	0.552	0.463	0.667	0.781	0.446	0.375	0.440	0.379

7.35	Youth/Family Con in hall	1.000	0.621	0.550	0.917	0.906	0.631	0.500	0.520	0.273
7.37	Other	0.500	0.414	0.163	0.167	0.156	0.077	0.125	0.160	0.106
7.39	Programs at Religious Institutions	0.750	0.690	0.363	0.500	0.313	0.154	0.375	0.080	0.030
7.43	Community Perf by Small Ens.	0.833	0.793	0.600	0.750	0.719	0.492	0.375	0.440	0.303
7.45	Community Perf by Orch	0.667	0.517	0.400	0.917	0.781	0.569	0.500	0.520	0.288
7.47	Community Chorus Programs	0.750	0.586	0.588	0.417	0.281	0.123	0.125	0.120	0.152
7.48	Community Orchestra Programs	0.333	0.103	0.138	0.083	0.031	0.123	0.000	0.080	0.091
7.49	Work with other community arts	0.750	0.552	0.313	0.500	0.719	0.569	0.375	0.320	0.242

**Table 5 – Proportional responses for entries for 2005 and 2008 surveys that are testable.**

Qid	Question	2005_C1	2005_C2	2005_C3	2008_C1	2008_C2	2008_C3
6.2	Programs rely on Musician Service Exchange?	0.333	0.031	0.000	0.000	0.000	0.015
7.04	Pre-Service Training for music teachers	0.250	0.188	0.062	0.250	0.080	0.061
7.05	In Service Training for classroom teachers	0.833	0.313	0.015	0.375	0.040	0.030
7.06	In Service Training for Music Teachers	0.750	0.281	0.077	0.500	0.040	0.045
7.31	Internships	0.833	0.563	0.338	0.500	0.480	0.197
7.32	Adopt-a-school	0.250	0.188	0.046	0.125	0.080	0.076
7.33	School-to-work	0.083	0.031	0.031	0.000	0.000	0.000
7.36	Programs at Community Facilities	0.750	0.719	0.246	0.375	0.440	0.182
13.01	Eval Own Program	1.000	0.938	0.815	0.250	0.520	0.500
13.02	Eval. Youth Orchestra	0.083	0.219	0.169	0.125	0.240	0.182
13.03	Eval. Music Learning Center	0.083	0.000	0.015	0.000	0.000	0.000
13.04	Eval. Pre-Service Training for classroom Teachers	0.167	0.094	0.062	0.125	0.080	0.030
13.05	Eval. Pre-Service Training for music teachers	0.167	0.125	0.092	0.125	0.040	0.030
13.06	Eval. In Service Training for classroom teachers	0.583	0.125	0.015	0.250	0.040	0.015

13.07	Eval. In Service Training for Music Teachers	0.500	0.094	0.062	0.250	0.040	0.030
13.08	Eval. In-School Residencies	0.333	0.406	0.154	0.250	0.240	0.045
13.09	Eval. Assembly Programs	0.333	0.250	0.138	0.000	0.080	0.091
13.1	Eval. Master Classes	0.333	0.156	0.231	0.125	0.040	0.061
13.11	Eval. Elementary School Programs	0.750	0.750	0.462	0.250	0.480	0.258
13.12	Eval. High School Programs	0.250	0.469	0.200	0.250	0.400	0.121
13.13	Eval. Continuing Education Programs	0.250	0.188	0.046	0.250	0.040	0.045
13.14	Eval. PreConcert Programs	0.250	0.188	0.231	0.125	0.160	0.091
13.15	Eval. Run Out Youth Concerts	0.083	0.188	0.062	0.125	0.120	0.015
13.16	Eval. Composition Workshops	0.333	0.063	0.031	0.000	0.080	0.030
13.17	Eval. Collaborations w other groups	0.250	0.219	0.185	0.125	0.160	0.106
13.19	Eval. Full orch concerts in school	0.167	0.031	0.046	0.125	0.040	0.076
13.2	Eval. Comm Music School	0.083	0.063	0.015	0.000	0.120	0.000
13.21	Eval. Instrumental Training	0.250	0.188	0.062	0.000	0.040	0.045
13.22	Eval. Long Term Partnerships	0.750	0.344	0.062	0.125	0.120	0.015
13.23	Eval. In School Workshops/Coaching	0.500	0.281	0.092	0.125	0.120	0.000
13.24	Eval. Pre-School Programs	0.333	0.313	0.015	0.125	0.120	0.015
13.25	Eval. Middle School Programs	0.500	0.594	0.292	0.250	0.400	0.136
13.26	Eval. College Programs	0.250	0.125	0.031	0.000	0.080	0.030
13.27	Eval. Special Education Programs	0.083	0.031	0.015	0.000	0.040	0.000
13.28	Eval. School Concerts in your hall	0.583	0.688	0.400	0.125	0.200	0.136
13.29	Eval. Competitions	0.167	0.094	0.185	0.125	0.040	0.091
13.3	Eval. Internships	0.417	0.125	0.138	0.250	0.080	0.045
13.31	Eval. Adopt-a-school	0.083	0.000	0.015	0.000	0.040	0.000
13.32	Eval. School-to-work	0.083	0.031	0.015	0.000	0.000	0.000
13.34	Eval. Family Concerts in your hall	0.333	0.344	0.323	0.125	0.160	0.152
13.35	Eval. Programs at Community Facilities	0.417	0.125	0.108	0.125	0.200	0.015
13.36	Eval. other	0.083	0.031	0.015	0.000	0.080	0.045
13.37	Eval. Programs at Religious Institutions	0.250	0.031	0.062	0.125	0.000	0.000
13.38	Eval. Community Perf by Small Ens.	0.417	0.125	0.108	0.125	0.120	0.045
13.39	Eval. Community Perf by Orch	0.417	0.063	0.215	0.125	0.040	0.076
13.4	Eval. Community Chorus Programs	0.083	0.031	0.062	0.000	0.000	0.030
13.41	Eval. Community Orchestra Programs	0.083	0.000	0.077	0.000	0.000	0.061
13.42	Eval. Work with other community arts	0.167	0.063	0.215	0.125	0.160	0.091

13.43	Eval. In School Chamber/Ensemble	0.250	0.375	0.292	0.125	0.200	0.091
14.1	Eval In House	0.667	0.844	0.785	0.250	0.440	0.455
14.2	Eval Outsourced	0.333	0.094	0.015	0.000	0.080	0.015
14.3	Use Videotape as a component	0.417	0.156	0.108	0.000	0.080	0.121
15.1	Programs aligned with arts standards - Local	0.750	0.500	0.385	0.250	0.200	0.152
15.2	Programs aligned with arts standards - State	0.917	0.750	0.508	0.250	0.400	0.333
15.3	Programs aligned with arts standards - National	0.833	0.594	0.200	0.250	0.320	0.227
15.4	Programs aligned with academic standards - Local	0.667	0.344	0.354	0.125	0.120	0.167
15.5	Programs aligned with academic standards - State	0.833	0.563	0.338	0.250	0.320	0.242
15.6	Programs aligned with academic standards - National	0.667	0.313	0.123	0.250	0.160	0.121
16.1	Focus - Skills Based	0.833	0.750	0.385	0.250	0.400	0.227
16.2	Focus - Interdisciplinary	0.917	0.938	0.415	0.250	0.360	0.288
16.3	Focus - Aesthetic Ed.	0.583	0.781	0.631	0.250	0.320	0.318
17.1	Professional Development Provided	0.833	0.500	0.108	0.250	0.320	0.136
17.2	Musicians Compensated for Prof Dev Time	0.583	0.375	0.154	0.250	0.200	0.091
18.1	Participates in local coalitia with another arts/ed org.	0.833	0.719	0.554	0.125	0.320	0.333
18.2	Orch advocates locally for in-school music ed	0.750	0.781	0.585	0.250	0.320	0.409
18.3	Orch advocates at state legislature for increase in music ed funding	0.333	0.313	0.231	0.000	0.080	0.197

## ***P-VALUES***

The entries within each cell are the *P*-values (to 4 decimal places) of the test of the null hypothesis that there is no difference between the true proportion selecting “Yes” within the 3 groups being compared. These *P*-values are similar to those that one would obtain from performing a traditional Pearson’s Chi-squared test of independence with 2 degrees of freedom, although they are usually slightly different, since Fisher’s exact test is used here, which is preferred when sample counts are small, as is often the case here. Those *P*-values that are 0.01 or less are judged to be “statistically significant” and are in bold font.

**Table 6 – Number of Significant *P*-values in 43 Items by Comparison Type**

<b>Comparison</b>	<b># of Significant <i>P</i>-values</b>
<b>Across 3 Orchestra Size Classes in 2001</b>	<b>22</b>
<b>Across 3 Orchestra Size Classes in 2005</b>	<b>20</b>
<b>Across 3 Orchestra Size Classes in 2008</b>	<b>4</b>
<b>Across 3 Years for Orchestra Class C1</b>	<b>5</b>
<b>Across 3 Years for Orchestra Class C2</b>	<b>14</b>
<b>Across 3 Years for Orchestra Class C3</b>	<b>15</b>
<b>Total Number of Significances</b>	<b>70</b>

**Table 7 – Number of Significant *P*-values in 66 Items by Comparison Type**

<b>Comparison</b>	<b># of Significant <i>P</i>-values</b>
<b>Across 3 Orchestra Size Classes in 2005</b>	<b>20</b>
<b>Across 3 Orchestra Size Classes in 2008</b>	<b>4</b>
<b>Across 2 Years for Orchestra Class C1</b>	<b>4</b>
<b>Across 2 Years for Orchestra Class C2</b>	<b>7</b>
<b>Across 2 Years for Orchestra Class C3</b>	<b>7</b>
<b>Total Number of Significances</b>	<b>42</b>

**Table 8 - P-Values in Comparable data sets from 2001, 2005 and 2008**

QID	Item	2001	2005	2008	C1	C2	C3
1.1	One Department	0.5179	0.6587	1.0000	0.2201	<b>0.0012</b>	<b>0.0000</b>
1.2	Two or more Dept	0.2601	0.7926	0.6151	0.4303	0.2105	0.6950
1.5	Education	0.3044	0.5612	0.4213	0.7409	0.3813	0.4398
1.6	Marketing	0.6096	0.5199	0.0963	0.2527	0.1846	0.5854
1.7	Community Relations	<b>0.0025</b>	0.0846	0.5002	0.3812	0.0938	0.6288
1.8	Operations	0.0293	1.0000	0.0797	1.0000	0.0519	0.1181
1.9	Other	1.0000	1.0000	0.1176	0.0669	0.0261	<b>0.0018</b>
3.2	Musicians' Salaries/Payroll for youth concerts included in ed/comm budget	0.1292	0.4320	0.3979	0.5008	0.1660	0.0358
3.3	Ed. Services at red. rate	0.2629	0.1829	0.6899	0.8055	0.7128	0.5107
4.1	Separate Endowment	0.0890	0.0194	0.1337	0.5934	0.8892	0.3401
6.1	Ticket Revenue Program	<b>0.0026</b>	<b>0.0000</b>	0.0107	0.0165	<b>0.0060</b>	0.0429
7.01	Youth Orchestra	0.1249	0.6811	0.4734	0.8937	0.3699	0.2094
7.02	Music Learning Center	0.3042	0.3213	1.0000	1.0000	0.1982	0.3214
7.03	Pre-Service Training for classroom Teachers	<b>0.0000</b>	0.0181	0.5473	<b>0.0017</b>	<b>0.0021</b>	0.2362
7.07	In-School Residencies	<b>0.0000</b>	<b>0.0001</b>	0.0260	0.5722	0.4471	0.5899
7.08	Assembly Programs	0.0165	<b>0.0015</b>	0.7499	0.1161	0.0134	0.7340
7.09	Master Classes	<b>0.0008</b>	<b>0.0006</b>	0.3117	0.1190	<b>0.0020</b>	0.0240
7.1	Elementary School Programs	<b>0.0022</b>	<b>0.0000</b>	0.1567	<b>0.0015</b>	<b>0.0001</b>	<b>0.0013</b>
7.11	High School Programs	<b>0.0000</b>	<b>0.0000</b>	0.0700	0.0137	0.0684	0.8069
7.12	Continuing Education Programs	<b>0.0011</b>	<b>0.0088</b>	<b>0.0001</b>	1.0000	0.1487	0.0654
7.13	Pre-Concert Programs	<b>0.0048</b>	<b>0.0000</b>	0.1310	0.0165	<b>0.0002</b>	<b>0.0012</b>
7.14	Run Out Youth Concerts	<b>0.0013</b>	0.0310	0.0358	0.0706	0.3068	0.0385
7.15	Composition Workshops	<b>0.0000</b>	<b>0.0036</b>	0.0142	0.7545	0.9481	0.5413
7.16	Collaborations w other groups	<b>0.0006</b>	<b>0.0017</b>	0.4099	<b>0.0015</b>	<b>0.0001</b>	<b>0.0007</b>
7.18	Full orch concerts in school	0.7865	0.0139	0.5756	0.7584	0.9065	0.1109
7.19	Music School	0.5612	<b>0.0036</b>	0.1639	<b>0.0011</b>	<b>0.0096</b>	<b>0.0012</b>
7.2	Instrumental Training	0.0521	<b>0.0010</b>	0.0179	0.9069	0.3832	0.0887
7.22	Long Term Partnerships	<b>0.0000</b>	<b>0.0000</b>	<b>0.0085</b>	0.0137	0.1024	0.1388
7.23	In School Workshops/Coaching	<b>0.0000</b>	<b>0.0000</b>	<b>0.0095</b>	0.1190	<b>0.0078</b>	0.4009
7.24	Pre-School Programs	<b>0.0000</b>	<b>0.0000</b>	0.2417	<b>0.0095</b>	<b>0.0004</b>	0.2063

7.25	Middle School Programs	<b>0.0000</b>	<b>0.0000</b>	0.0348	0.0598	<b>0.0035</b>	0.0305
7.26	College Programs	<b>0.0000</b>	0.0908	0.2784	0.0913	0.2432	<b>0.0045</b>
7.27	Special Education Programs	0.5565	<b>0.0088</b>	0.5046	0.3969	0.5594	0.2906
7.28	School Concerts in your hall	<b>0.0000</b>	<b>0.0004</b>	0.0150	0.0165	<b>0.0022</b>	<b>0.0003</b>
7.3	Competitions	0.3727	<b>0.0046</b>	0.8939	0.3935	0.0228	0.5726
7.35	Youth/Family Con in hall	<b>0.0061</b>	<b>0.0040</b>	0.0630	0.0165	<b>0.0028</b>	<b>0.0001</b>
7.37	Other	<b>0.0035</b>	0.3426	0.6975	0.1714	0.0464	0.2918
7.39	Programs at Religious Institutions	<b>0.0014</b>	0.0164	<b>0.0081</b>	0.2339	<b>0.0000</b>	<b>0.0000</b>
7.43	Community Perf by Small Ens.	0.0805	0.0588	0.4398	0.1386	0.0217	<b>0.0015</b>
7.45	Community Perf by Orch	0.1710	0.0181	0.0918	0.1366	0.0488	<b>0.0045</b>
7.47	Community Chorus Programs	0.6239	0.0212	1.0000	0.0231	<b>0.0010</b>	<b>0.0000</b>
7.48	Community Orchestra Programs	0.1562	0.3677	1.0000	0.1515	0.5763	0.6913
7.49	Work with other community arts	<b>0.0035</b>	0.2617	0.5472	0.2339	0.0114	<b>0.0003</b>

**Table 9 - P-Values in Comparable data sets from 2005 and 2008**

Qid	Item	2005	2008	C1	C2	C3
6.2	Programs rely on Musician Service Exchange?	<b>0.0001</b>	1.0000	0.1166	1.0000	1.0000
7.04	Pre-Service Training for music teachers	0.0438	0.1719	1.0000	0.4444	1.0000
7.05	In Service Training for classroom teachers	<b>0.0000</b>	<b>0.0072</b>	0.0623	0.0155	1.0000
7.06	In Service Training for Music Teachers	<b>0.0000</b>	<b>0.0017</b>	0.3563	0.0317	0.4922
7.31	Internships	<b>0.0025</b>	<b>0.0094</b>	0.1611	0.5994	0.0778
7.32	Adopt-a-school	0.0181	0.8408	0.6186	0.4444	0.7179
7.33	School-to-work	0.5633	1.0000	1.0000	1.0000	0.2443
7.36	Programs at Community Facilities	<b>0.0000</b>	0.0280	0.1675	0.0560	0.4007
13.01	Eval Own Program	0.1407	0.4474	<b>0.0007</b>	<b>0.0004</b>	<b>0.0002</b>
13.02	Eval. Youth Orchestra	0.6133	0.7100	1.0000	1.0000	1.0000
13.03	Eval. Music Learning Center	0.2932	1.0000	1.0000	1.0000	0.4962
13.04	Eval. Pre-Service Training for classroom Teachers	0.3280	0.2226	1.0000	1.0000	0.4403
13.05	Eval. Pre-Service Training for music teachers	0.6718	0.3337	1.0000	0.3722	0.1645
13.06	Eval. In Service Training for classroom teachers	<b>0.0000</b>	0.0241	0.1968	0.3722	1.0000
13.07	Eval. In Service Training for Music Teachers	<b>0.0007</b>	0.0817	0.3729	0.6233	0.4403
13.08	Eval. In-School Residencies	0.0156	0.0101	1.0000	0.2597	0.0447

13.09	Eval. Assembly Programs	0.1642	1.0000	0.1166	0.1600	0.4246
13.1	Eval. Master Classes	0.4086	0.6077	0.6027	0.2154	<b>0.0064</b>
13.11	Eval. Elementary School Programs	0.0121	0.1176	0.0648	0.0532	0.0182
13.12	Eval. High School Programs	0.0246	0.0109	1.0000	0.7884	0.2425
13.13	Eval. Continuing Education Programs	0.0181	0.1070	1.0000	0.1217	1.0000
13.14	Eval. Pre-Concert Programs	0.8383	0.5059	0.6186	1.0000	0.0339
13.15	Eval. Run Out Youth Concerts	0.1230	0.0428	1.0000	0.7168	0.2079
13.16	Eval. Composition Workshops	<b>0.0040</b>	0.5046	0.1166	1.0000	1.0000
13.17	Eval. Collaborations w other groups	0.8266	0.6975	0.6186	0.7391	0.2243
13.19	Eval. Full orch concerts in school	0.2298	0.6673	1.0000	1.0000	0.7179
13.2	Eval. Comm Music School	0.2038	0.0313	1.0000	0.6446	0.4962
13.21	Eval. Instrumental Training	0.0438	1.0000	0.2421	0.1217	0.7179
13.22	Eval. Long Term Partnerships	<b>0.0000</b>	0.0428	0.0198	0.0671	0.2079
13.23	Eval. In School Workshops/Coaching	<b>0.0016</b>	0.0119	0.1577	0.1953	0.0132
13.24	Eval. Pre-School Programs	<b>0.0000</b>	0.0428	0.6027	0.1165	1.0000
13.25	Eval. Middle School Programs	0.0134	0.0179	0.3729	0.1864	0.0344
13.26	Eval. College Programs	0.0162	0.5046	0.2421	0.6856	1.0000
13.27	Eval. Special Education Programs	0.3213	0.3333	1.0000	1.0000	0.4962
13.28	Eval. School Concerts in your hall	0.0216	0.8091	0.0697	<b>0.0004</b>	<b>0.0008</b>
13.29	Eval. Competitions	0.5375	0.4817	1.0000	0.6233	0.1353
13.3	Eval. Internships	0.0600	0.0893	0.6424	0.6856	0.0764
13.31	Eval. Adopt-a-school	0.2932	0.3333	1.0000	0.4386	0.4962
13.32	Eval. School-to-work	0.3213	1.0000	1.0000	1.0000	0.4962
13.34	Eval. Family Concerts in your hall	1.0000	1.0000	0.6027	0.1412	0.0246
13.35	Eval. Programs at Community Facilities	0.0368	<b>0.0057</b>	0.3246	0.4852	0.0328
13.36	Eval. other	0.3213	0.7481	1.0000	0.5762	0.6192
13.37	Eval. Programs at Religious Institutions	0.0521	0.0808	0.6186	1.0000	0.0578
13.38	Eval. Community Perf by Small Ens.	0.0368	0.3197	0.3246	1.0000	0.2064
13.39	Eval. Community Perf by Orch	0.0192	0.6673	0.3246	1.0000	0.0270
13.4	Eval. Community Chorus Programs	0.7036	1.0000	1.0000	1.0000	0.4403
13.41	Eval. Community Orchestra Programs	0.2787	0.6961	1.0000	1.0000	0.7441
13.42	Eval. Work with other community arts	0.1481	0.5059	1.0000	0.3883	0.0551
13.43	Eval. In School Chamber/Ensemble	0.6529	0.2683	0.6186	0.2432	<b>0.0038</b>
14.1	Eval In House	0.4211	0.6163	0.1698	<b>0.0019</b>	<b>0.0001</b>



14.2	Eval Outsourced	<b>0.0012</b>	0.3664	0.1166	1.0000	1.0000
14.3	Use Videotape as a component	0.0308	0.7651	0.0547	0.4498	1.0000
15.1	Programs aligned with arts standards - Local	0.0589	0.6325	0.0648	0.0275	<b>0.0031</b>
15.2	Programs aligned with arts standards - State	<b>0.0048</b>	0.7453	<b>0.0044</b>	0.0136	0.0523
15.3	Programs aligned with arts standards - National	<b>0.0000</b>	0.6589	0.0194	0.0613	0.8317
15.4	Programs aligned with academic standards - Local	0.1152	0.9008	0.0281	0.0671	0.0173
15.5	Programs aligned with academic standards - State	<b>0.0025</b>	0.8181	0.0194	0.1075	0.2522
15.6	Programs aligned with academic standards - National	<b>0.0002</b>	0.4692	0.1698	0.2266	1.0000
16.1	Focus - Skills Based	<b>0.0002</b>	0.2559	0.0194	0.0136	0.0593
16.2	Focus - Interdisciplinary	<b>0.0000</b>	0.7776	<b>0.0044</b>	<b>0.0000</b>	0.1455
16.3	Focus - Aesthetic Ed.	0.2432	1.0000	0.1968	<b>0.0010</b>	<b>0.0004</b>
17.1	Professional Development Provided	<b>0.0000</b>	0.1067	0.0194	0.1904	0.7906
17.2	Musicians Compensated for Prof Dev Time	<b>0.0018</b>	0.1695	0.1968	0.2432	0.2987
18.1	Participates in local coalitia with another arts/ed org.	0.1099	0.5753	<b>0.0045</b>	<b>0.0036</b>	0.0139
18.2	Orch advocates locally for in-school music ed	0.1426	0.5644	0.0648	<b>0.0010</b>	0.0551
18.3	Orch advocates at state legislature for increase in music ed funding	0.5875	0.2396	0.1166	0.0491	0.6747

## Responses: Orchestras Reviewed in the 1996 Myers Report

A grant enabled Myers to conduct on-site visits with nine orchestras. The resulting Orchestra Partnership Profiles provided an in-depth look at the educational and community efforts in each of these organizations. Visits were made to the New York Philharmonic, Chicago Symphony Orchestra, Fort Wayne Philharmonic, Milwaukee Symphony Orchestra, Cedar Rapids Symphony (now called Orchestra Iowa), Boston Symphony, Pacific Symphony Orchestra, Pittsburgh Symphony Orchestra, and the Austin Symphony Orchestra. For the present study, as no grant funds were available, it was therefore decided to solicit similar information via email. Relying partly on a conversation with Myers, the researcher developed a set of five questions that explored how each orchestra had functioned in education and community service during the

last twenty years, how often the position of outreach director had turned over in that time, and whether the original report was still used or remembered. The questions were as follows.

1. Briefly outline the history of your position over the last 20 years. How many people have served in this capacity in that time?
2. Were you aware of the Myers Report, is there a copy in your organization that you were aware of, and are you aware of any impact the report may have had on outreach in your organization?
3. In what way has outreach changed in your organization in recent memory? Do you anticipate its place in the overall organization increasing or decreasing?
4. In your opinion, what are the major factors, particular to your organization, that limit or aid in the status of outreach? What evaluative process do you use to determine the viability of an outreach program? How do you decide which programs to choose for the next cycle?
5. What evaluative process do you use to determine the viability of an outreach program? How do you decide which programs to choose for the next cycle?

In each case, the most senior education/community outreach staff member was contacted. After follow-up contacts were made over a one-year period, responses were received from the following five organizations: The New York Philharmonic, Chicago Symphony Orchestra, Fort Wayne Philharmonic, Milwaukee Symphony Orchestra, and Orchestra Iowa (known as the Cedar Rapids Symphony in 1996). The complete set of responses appears in Appendix C. Responses are listed in the order in which they were received and are arranged by question. The

titles of the respondents are given next to the parent organizations. A comparison to the original data appears in Chapter 5.

## CHAPTER 5

### SUMMARY, DISCUSSION, AND CONCLUSIONS

Chapter 5 summarizes the results of the LOAO survey comparisons and discusses trends that have emerged from statistical examination of the data. Also examined are changes that have taken place in the twenty years between the on-site visits featured in the Myers Report and the emailed survey conducted for this study. The emailed survey was based on questions asked during Myers' in-person visits and was designed to elicit as much comparable information as possible. The responses to the recent survey are reproduced verbatim in Appendix C. Conclusions are drawn, and the chapter ends with recommendations for further research.

### LOAO SURVEY DATA RESULTS

The 1996 Myers survey gathered data from 283 organizations (Myers & Thomas, 1996). Of those, 237 (84% of the respondents) had K-12 education programs in place. Where possible, data from the original survey is presented along with trends identified from the 2001, 2005, and 2008 surveys. It is important to note that a severe economic downturn began at the end of 2007, which may have had a serious effect on the education and community relations programs of the organizations participating in the 2008 survey.

For the 43 items that had matching data across all three years of surveys, there were a few questions that fulfilled the following criteria:

1. The data sets were from items similar or exact enough to be compared across all three surveys.

2. The items asked were of a type that made the reduction of the responses into a binary set possible.
3. The  $P$ -values from these responses were less than 0.01 and were statistically significant.

According to these criteria, specific items were selected for analysis. For these purposes, the item numbers assigned to link the surveys together were used to help with cross referencing items from each of the three years of surveys.

The questions in each of the surveys were separated by the researcher into sections. The 2001 survey contained 10 sections. In 2005, that number was increased to 18, as sections on populations served, evaluation methods, standards alignment, and the total number of schools served were added to the survey. In 2008, a 19<sup>th</sup> section on the number of music teachers in the local community of the orchestra was added. The survey that was conducted in 2014 was not released by the LOAO and could not be tabulated in these findings. As previously noted, the 2017 survey marked a departure from earlier efforts at data collection and shares no comparable data points with the first three surveys, which are more in line with the questions addressed in the Myers Report. The results here are organized by the relevant sections contained in the 2001, 2005 and 2008 surveys, with accompanying information from the Myers Report, 2014 LOAO publication, or the 2017 survey. Data from the 43 items that yielded significant results across all three surveys are discussed first, followed by data from the 66 items that yielded significant results from the 2005 and 2008 surveys.

## RELEVANT DATA – 3 YEAR RESULTS

### SECTION 1

Section 1 addresses the organization of the education and community relations (ed/comm) staff. Again, only those items with verifiable data and that have yielded statistically significant results are examined in this section.

1.1 – 1.9 Are education and community relations activities at your orchestra one department, or two or more distinct departments?

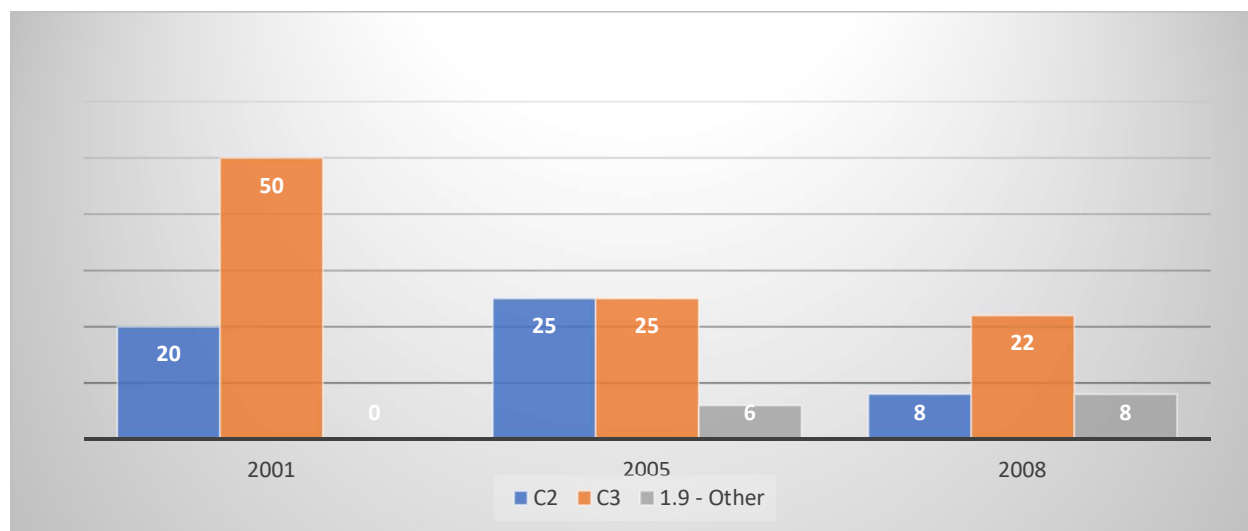
1.9 If more than one department, please indicate which departments are involved – Other.

Data gathered from this item yielded statistically significant results in Class 2 responses (LOAO Groups 2-4), which indicate that the number of orchestras in Class 2 whose ed/comm relations activities were placed in one department rose in 2005 and fell again in 2008. In Class 3 (LOAO Groups 5-8), the number of organizations who have their ed/comm relations in one department went from 50/80 total responses in 2001, to 47/65 total responses in 2005, to 22/66 total responses in 2008. As the numbers for those with their ed/comm staff in more than one department stayed relatively static from 2005 to 2008 for the same Class, there must be a discrepancy in those groups who did not complete this item in the survey.

For example, in 2008, there were 66 respondents to the survey in Class 3. Twenty-two of those indicated two or more departments, and 22 indicate one department, which leaves 25 respondents who did not answer this item. These inconsistencies are the reason why not every item on the survey yields results that can be compared. For Class 3 organizations that answered in the affirmative for one department for their ed/comm staff across all three surveys, the number appears to have fallen. These data are statistically significant, though a cause cannot be

determined. The data from these sets are mapped in Graph 1, which shows a general trend for each of these items.

**Graph 1 – Section 1 item comparison by class of orchestra community activity across survey years: 1.1 - Number of organizations with ed/comm activities in one department.**  
**1.9 - "Other" as a department when two or more departments are used for ed/comm.**



Originally, the survey conducted by Meyers reviewed the types of staff members in the education advisory committee and the most frequent education working/program committees, which are included here as Illustrations 1 and 2.

**Illustrations 1 & 2. Committee Makeup ca. 1996 (Myers & Thomas, 1996). Used by permission.**



Figure 2. Most frequent education advisory committee members

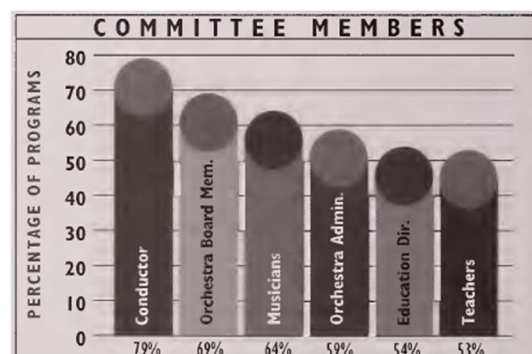
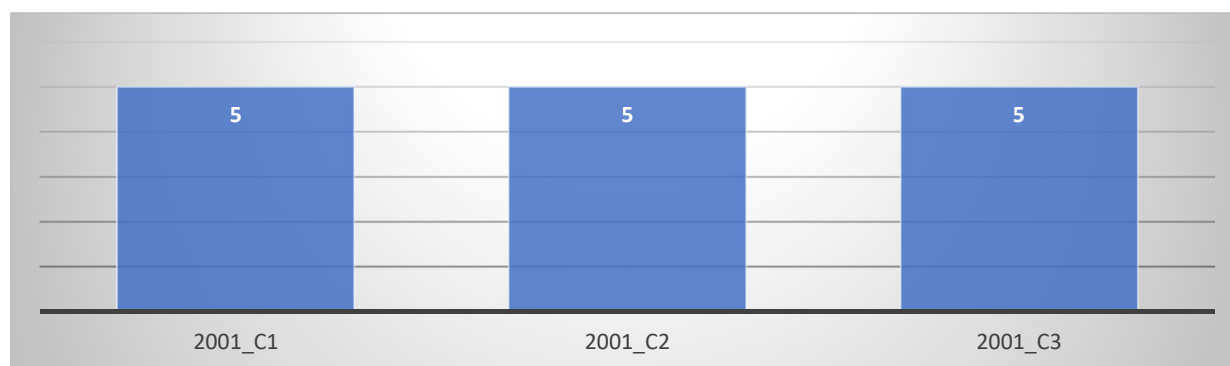


Figure 3. Most frequent education working/program committee members

Item 1.7 is part of a group of selections for the departments that are involved with ed/comm relations, if the organization utilizes more than one department. The choices are Education, Marketing, Community Relations, Operation, and Other. The number 1.7 is for the Community Relations choice in that item. Responses for 2001 across all three Classes were the only statistically significant result, and they were constant for all groupings of organizations, from the highest budget groups to the smallest community organizations that responded to the survey, as shown in Graph 2.

**Graph 2 - 2001 Survey comparison across all classes for item 1.7 - Community Relations as a department when two or more departments are used for ed/comm activities.**





## SECTION 2

Section 2 deals with the nature of staff for the ed/comm department or departments in each organization. Because the raw data were not made available from the LOAO, there are too many discrepancies in how the data are presented to yield any meaningful comparison across years or Classes.

## SECTION 3

Section 3 of the surveys deals with budgets and their makeup. None of the items in section 3 yielded results that were statistically significant for the purposes of this dissertation; however, the *Orchestra Facts* report from 2014 describes the following changes to orchestra budgets from 2006 to 2014. OSR stands for Orchestra Statistics Report, an annual report which was not made available for this research. NCAR refers to the National Center for Arts Research at Southern Methodist University, which incorporated IRS data from the Form 990s that all non-profit corporations must submit each year for tax purposes, along with the OSR report. As the NCAR is primarily a financial document and the focus of this dissertation is ed/comm relations, these reports were not considered necessary data. The relevant information pertaining to Section 3 of the LOAO surveys from the *Orchestra Facts* report is below:

- Across LOAO member orchestras, 40% of total income in 2014 was classified as earned income, 43% as contributed income, and 17% as investment income (OSR).
- The year 2013 was a moment of transition in ticket buying, as single ticket revenues and group sales exceeded subscription revenues for the first time. However, the reported 6% growth in single ticket revenue and income from group sales did not fully compensate for the reported 13% drop in subscription revenues (OSR).

- The overall change in total net assets improved by 46% between 2006 and 2014 (NCAR and OSR).
- Artistic pay and benefits were by far the greatest expenses incurred by orchestras in 2014, accounting for more than 46% — nearly half — of the average budget (OSR), a higher proportion than any other arts and cultural sector (NCAR).
- Eleven percent of expenses were dedicated to orchestra administrators' pay and benefits in the same year (OSR).
- Looking at the data another way, orchestras' concert production expenses accounted for over two thirds — 69% — of all orchestra expenditure in 2014 (OSR).

#### SECTION 4

The items in section 4 of the LOAO surveys pertain to separate endowments for ed/comm programs. Because the raw data were not made available from the LOAO, there are too many discrepancies in how the data were presented to yield any meaningful comparison across years or Classes. There are data for the numbers of orchestras who indicated a separate endowment; however, these were not statistically significant. They are included in the raw data in Chapter 4.

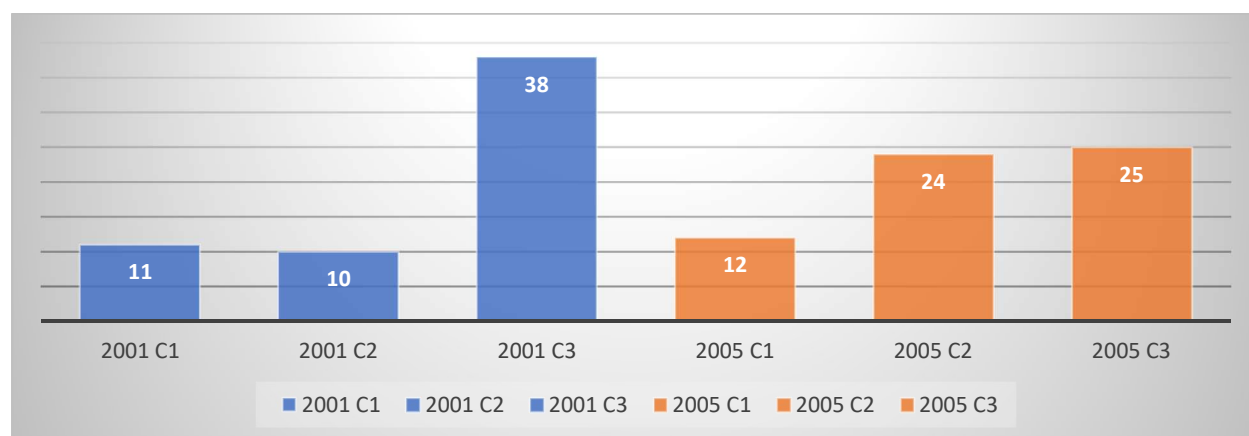
#### SECTION 5

The items for section 5 pertain to funding sources for ed/comm programs. The options are Individual, Government, Corporate, Foundation Grants, and Other. Because the raw data were not made available from the LOAO, there are too many discrepancies in how the data are presented to yield any meaningful comparison across years or Classes.

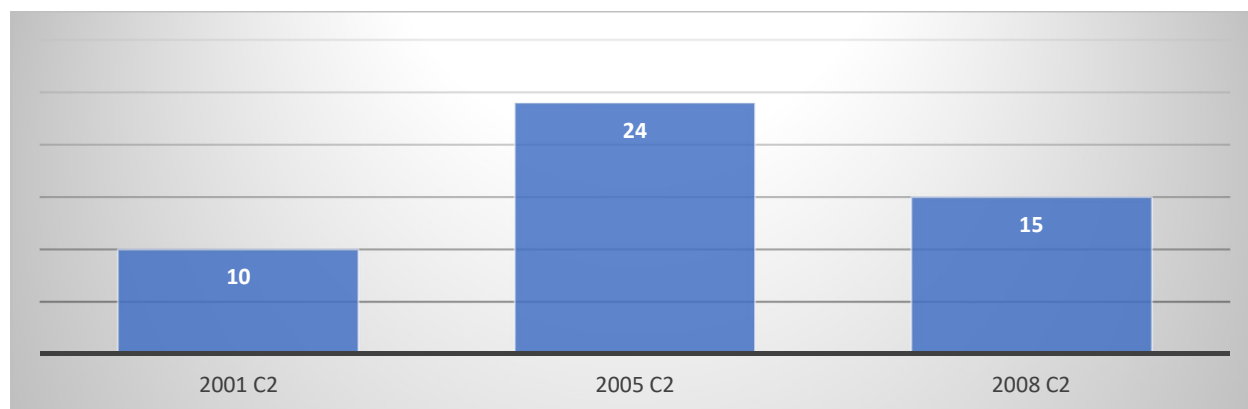
## SECTION 6

The items in section 6 ask if there are educational or community engagement programs that result in significant ticket sales for the organization. These can sometimes take the shape of schools attending a regular concert series, then attending a meet and greet or demonstration by orchestra personnel or a similar program. Item 6.1, which asks how many orchestras had programs that resulted in significant ticket revenue, was statistically significant for the 2001 and 2005 surveys across all three Classes (Graph 3A) and for Class 2 orchestras across all three survey years (Graph 3B). Smaller organizations, with reduced endowments, rely more on programs that also help to benefit the group financially, perhaps by offsetting contractual days or by adding to services performed by the musicians.

**Graph 3A– Section 6 item comparison across categories within a survey year. 6.1 - Ticket Revenue by Year.**



**Graph 3B– Section 6 item comparison across years within a category. 6.1 - Ticket Revenue by Year.**



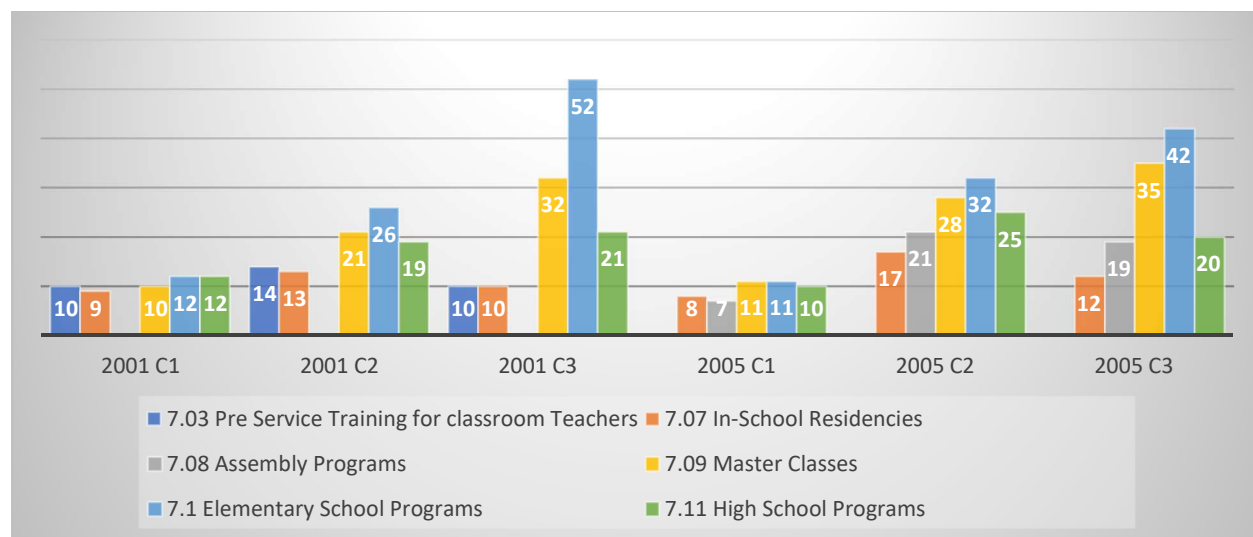
## SECTION 7

The items in section 7 deal with the types of programs that each orchestra supports. As these are numbers of groups that responded positively to a binary item, and the total number of respondents is known, it is possible to assume a total number and test for significance.

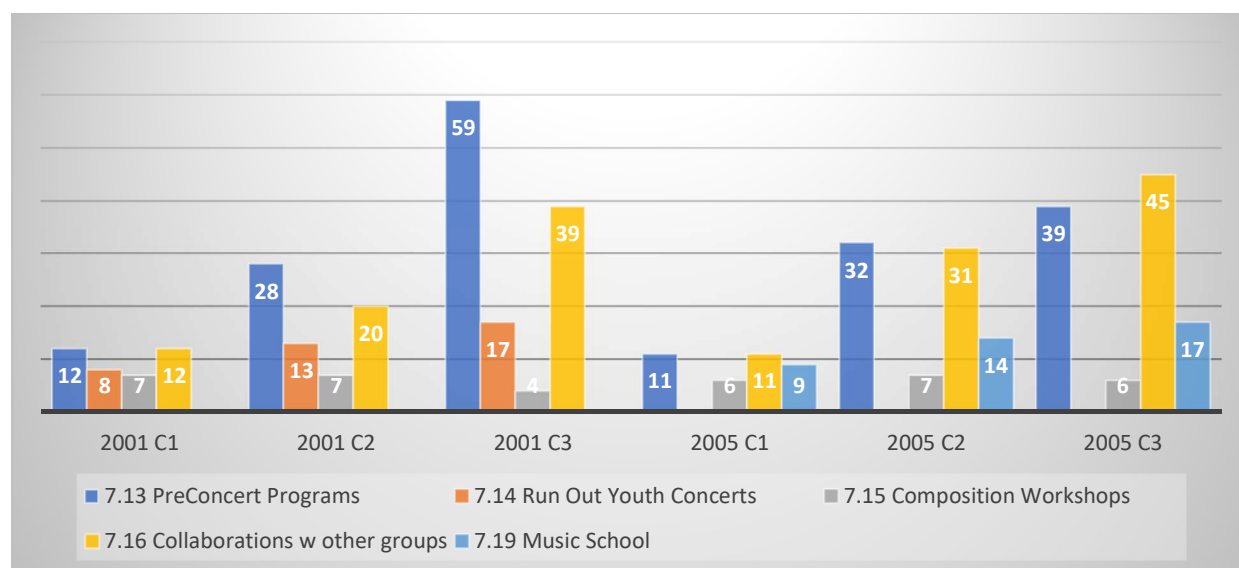
Statistically significant results were yielded by Pre-service Training for Classroom Teachers, In-School Residencies, Assembly Programs, Master Classes (Graph 4A), Elementary School Programs, High School Programs, Continuing Education Programs, Pre-Concert Programs, Run out Youth Concerts, Composition Workshops, Collaboration with Other Groups, and Music School Programs (Graph 4B), Instrumental Training, Pre-School Programs, Special Education Programs, Long Term Partnerships, Middle School Programs, In-School Workshops/Coaching, College Programs (Graph 4C), School Concerts in Your Hall, Competitions, Youth/Family Concerts in Your Hall, and Other (Graph 4D).

As is evident in the following tables, the smaller organizations in Class 3 (C3) support more outreach than their larger counterparts. Often these orchestras have close ties to their communities and are able to interact well with their neighborhood schools.

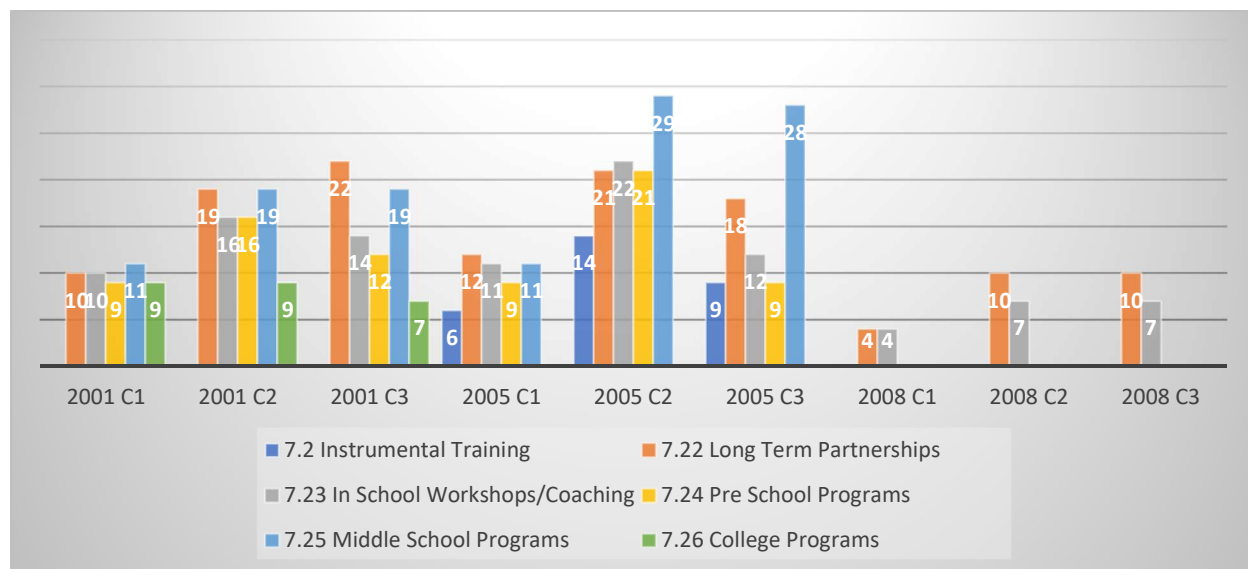
**Graph 4A – Section 7 item comparison across categories within a survey year.**



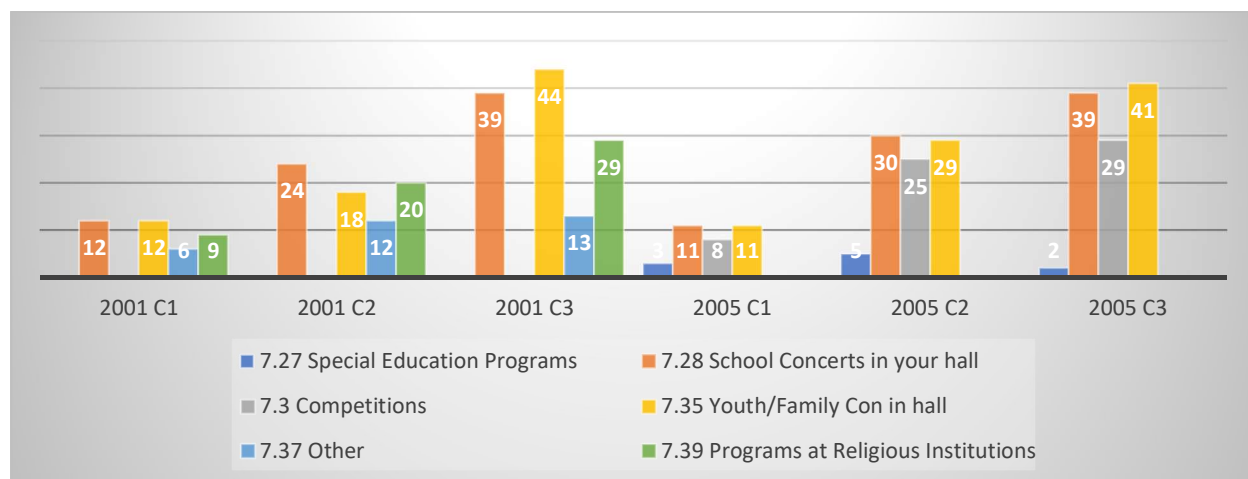
**Graph 4B – Section 7 item comparison across categories within a survey year.**



**Graph 4C - Section 7 item comparison across categories within a survey year.**



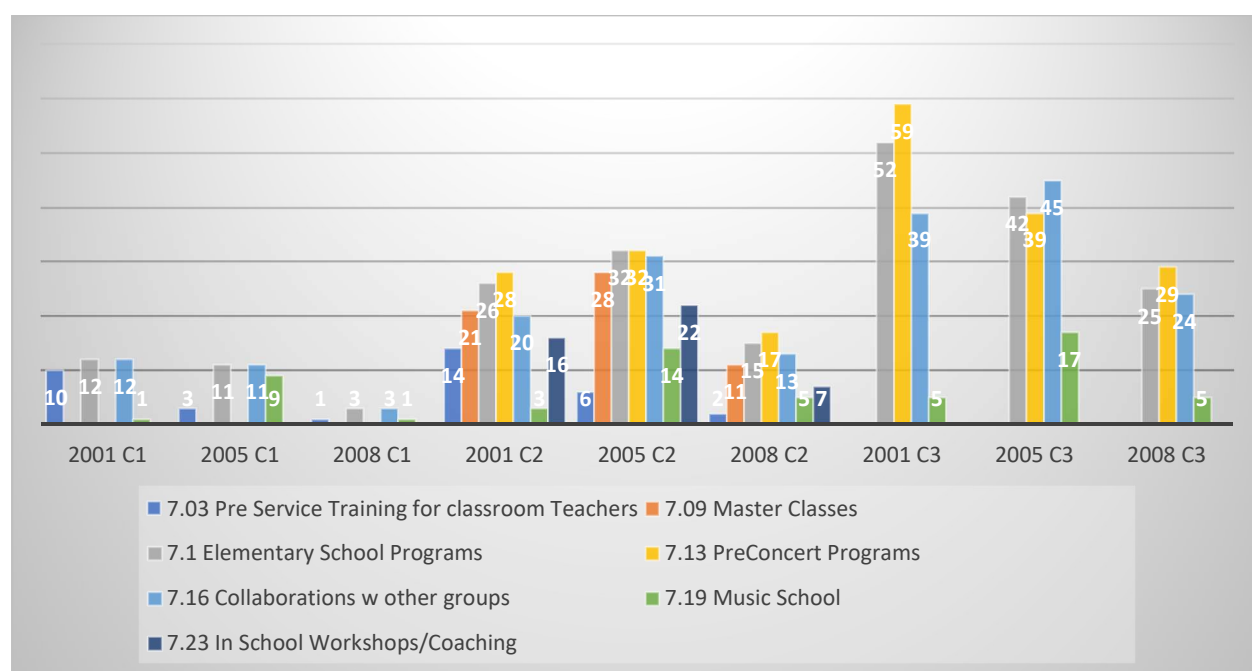
**Graph 4D- Section 7 item comparison across categories within a survey year.**



Also included in Graph 4D is one of a set of items about where these concerts take place. The only subset of this question that yielded statistically significant results was the option of Programs at Religious Institutions. Where a set of Classes or survey years did not yield significant results, it is omitted from the graph.

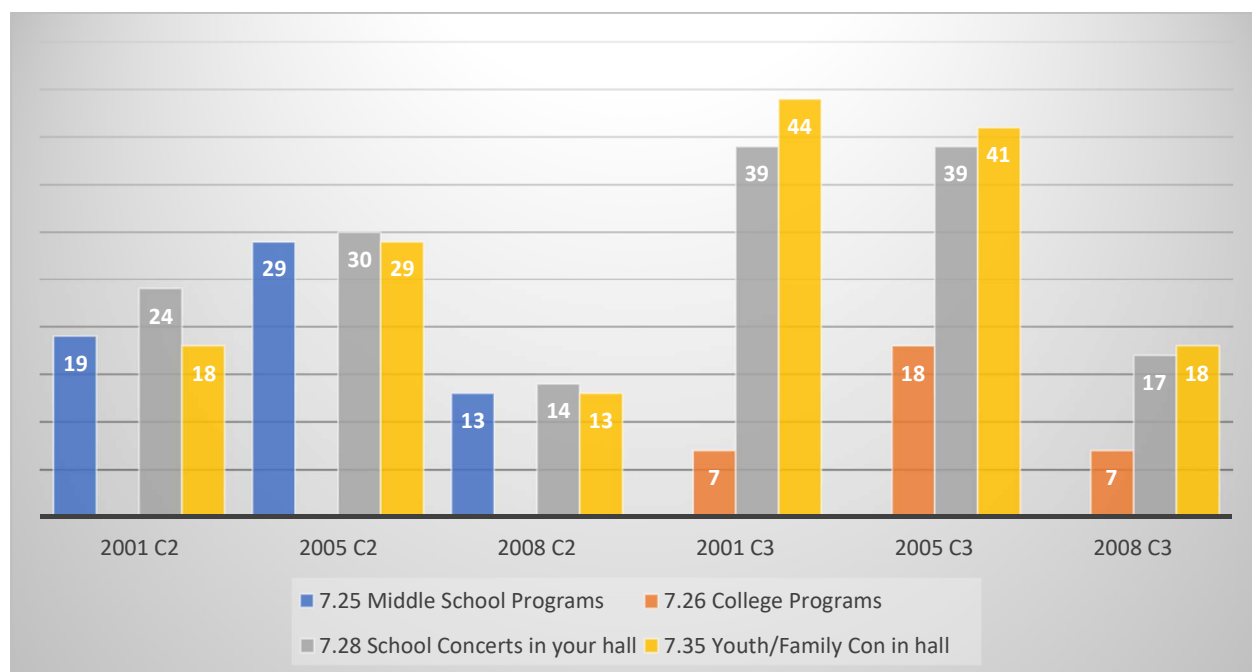
When the data are approached within each Class across all three years of surveys, a different group of responses become significant. Responses indicating how many orchestras hold Pre-Service Training for Classroom Teachers, Master Classes, Elementary School Programs, Pre-Concert Programs, Collaborations with Other Groups, Music School Performances, In-School Workshops/Coaching (Graph 5A), Pre-School Programs, Middle School Programs, College Programs, School Concerts in Your Hall, and Youth/Family Concerts in Your Hall (Graph 5B) are comparable.

**Graph 5A – Section 7 item comparison across survey years within a category.**

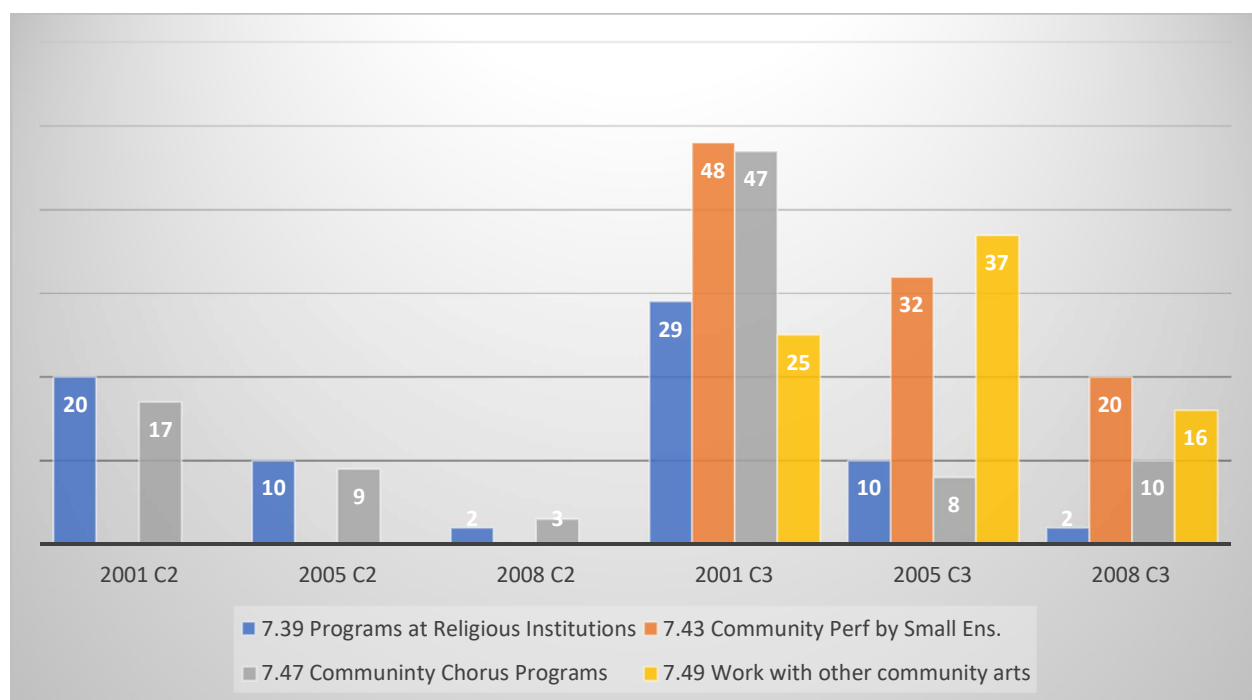


In addition, alternative concert locations, such as Programs at Religious Institutions, Community Performances by Small Ensembles, Community Chorus Programs, and Work with Other Community Arts Associations (Graph 5C) also yielded significant results when compared within one class of orchestras across all three years of surveys.

**Graph 5B – Section 7 item comparison across survey years within a category.**



**Graph 5C – Section 7 item comparison across survey years within a category.**





## SECTION 8

Section 8 contains items about websites and their focus. In the surveys, percentages are given without a verifiable set of respondents. Because the raw data were not made available from the LOAO, there are too many discrepancies in how the data were presented to yield meaningful comparison across years or Classes.

## SECTION 9

Section 9 is a list of materials produced beyond those for specific programs. These include brochures, CD-ROMs, teacher prep materials, and other documents. As these do not represent quantifiable data because the number of organizations that use a particular media are not stated, they are not presented here.

## SECTIONS 10 AND 11

These two sections pertain to contracts with other organizations, like a board of education, which help generate revenue to fund services for musicians to perform ed/comm work. In the surveys, percentages are given without a verifiable set of respondents. Because the raw data were not made available, there are too many discrepancies in how the data are presented to yield any meaningful comparison across years or Classes.

## RELEVANT DATA – 2 YEAR RESULTS

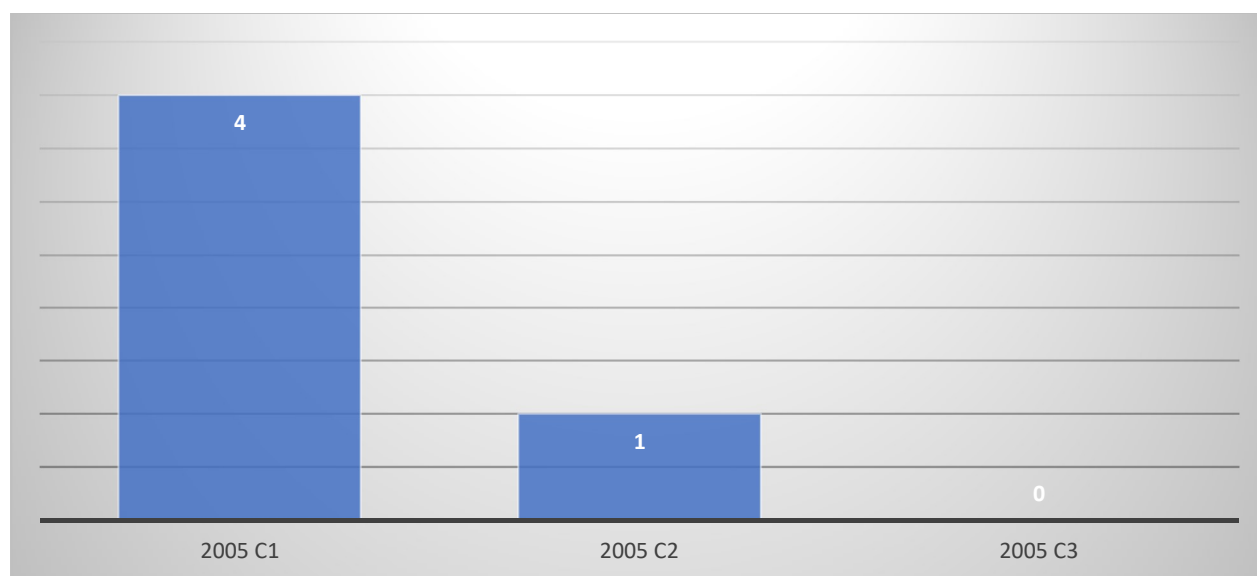
### SECTION 2

In the 2005 edition of the LOAO surveys, questions were added which addressed previously untracked issues. These items, if they represent the type of data that can be tracked without the original raw data, are represented here if the results are statistically significant.

### SECTION 6

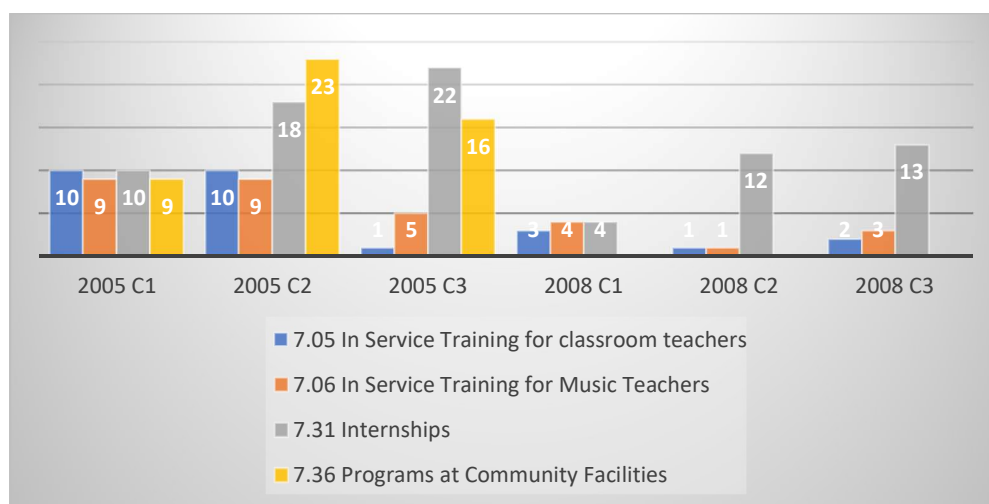
Often, musicians can exchange one type of service for another, which enables the orchestra to meet the needs of certain community engagement grants or funding without adding to the contracts of the full-time musicians. Such exchanges can be tracked in the 2005 survey across Classes, indicating that this practice is more common in larger orchestras than smaller ones (Graph 6).

**Graph 6– Section 6 item comparison across categories within a survey year. 6.2 - Ed/comm programs that rely on a Musician Service Exchange.**



Also, in 2005, a question about pre-service training for teachers was divided into two items, one for training for classroom teachers and another for music teachers. These can be tracked for both surveys, along with Internships and programs at community facilities, which also represent new items in 2005 (Graph 7). All of these Classes fell from 2005 to 2008, possibly because of the economic downturn at the time.

**Graph 7 - Comparison across categories within a survey year for types of ed/comm activities.**

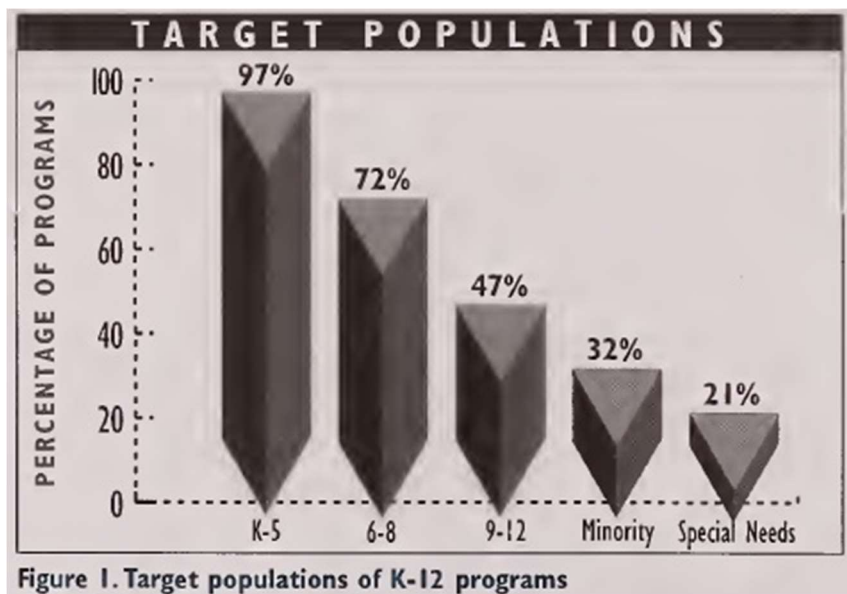


## SECTION 12

Section 12 in the 2005 and 2008 surveys pertains to statistics and demographics in orchestras. These Classes, which include various ages (pre-school, elementary, middle, high, and college ages), types of teachers (music vs. classroom), total numbers of school served by type, and demographics for under 18 and over 18 populations served by the ed/comm relations activities. These numbers are presented as averages in each Class, and without the raw data from

the LOAO, are not statistically relevant for comparison across Classes or years (See Illustration 3).

**Illustration 3. Percentage of Programs Reaching Target Populations ca. 1996 (Myers & Thomas, 1996, Used by permission.**



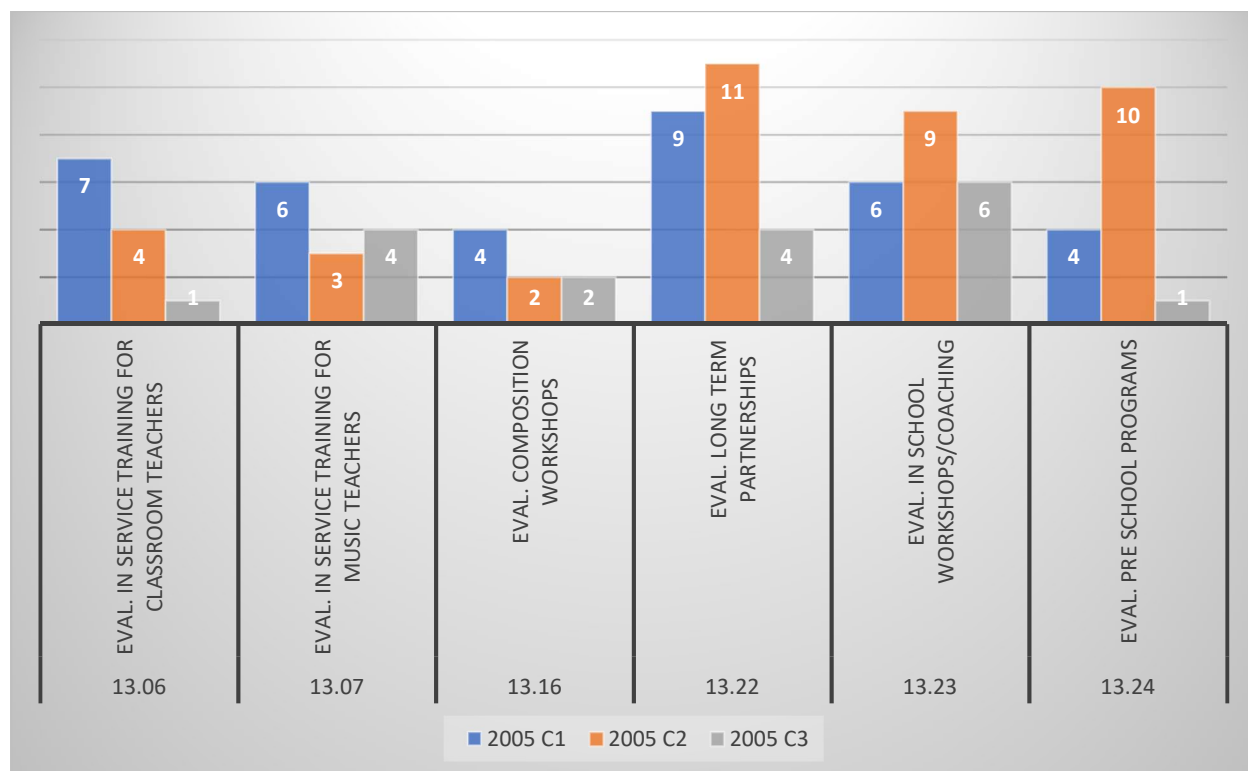
The 2014 and 2017 LOAO surveys solicited data pertaining to the racial breakdown of ed/comm activities. These have not been tested for significance, as the LOAO would not release any raw data, however they are presented here to complete the picture. For the 2014 survey, the demographic profile of these participants was diverse: 38% of participants were reported to be African American, Hispanic / Latino, Asian American / Pacific Islander, or American Indian /Alaskan Native, and 62% were reported to be white. For the 2017 survey, 38% of EdCE participants were believed to be African American, Hispanic / Latino, Asian / Pacific Islander, or American Indian / Alaskan Native, and 62% were white.

## SECTION 13

The largest addition of items appears in the evaluation section, where each program presented in section 7 is presented again in the 2005 and 2008 surveys for evaluative purposes. Evaluation practices differ widely from organization to organization, so the survey only deals with a yes/no answer to each type of engagement.

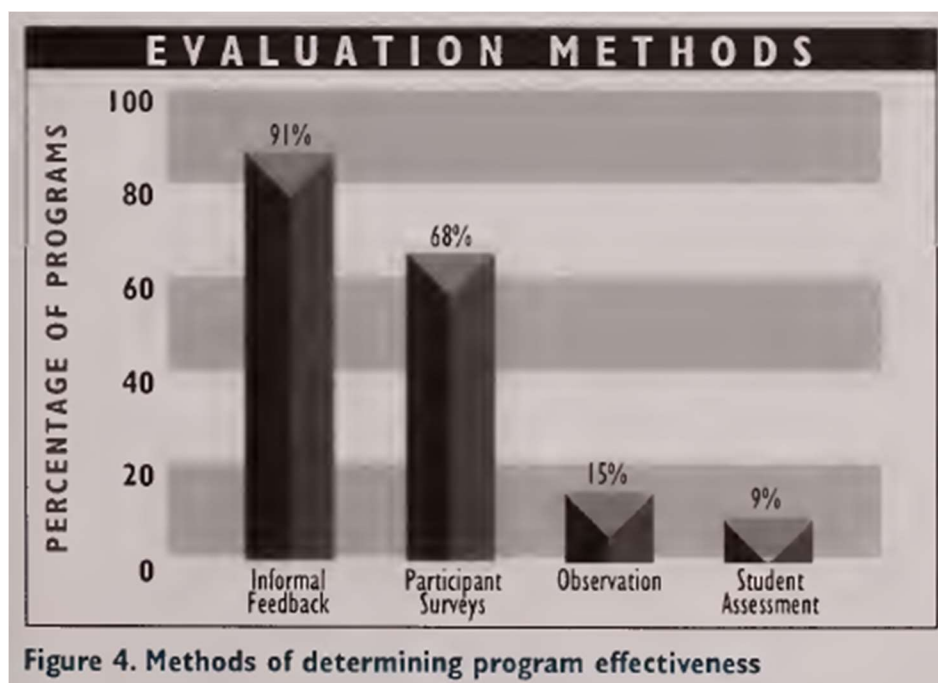
Across Classes in the 2005 survey, the following categories of evaluation yielded significant results: In-Service Training for Classroom Teachers, In-Service Training for Music Teachers, Composition Workshops, Long Term Partnerships, In School Workshops/Coaching, and Pre-School Programs (Graph 8A). In the 2008 survey, the Class of Evaluating Programs at Community Facilities yielded statistical results (Graph 8B).

**Graph 8A– Section 13 item comparison across categories within a survey year.**

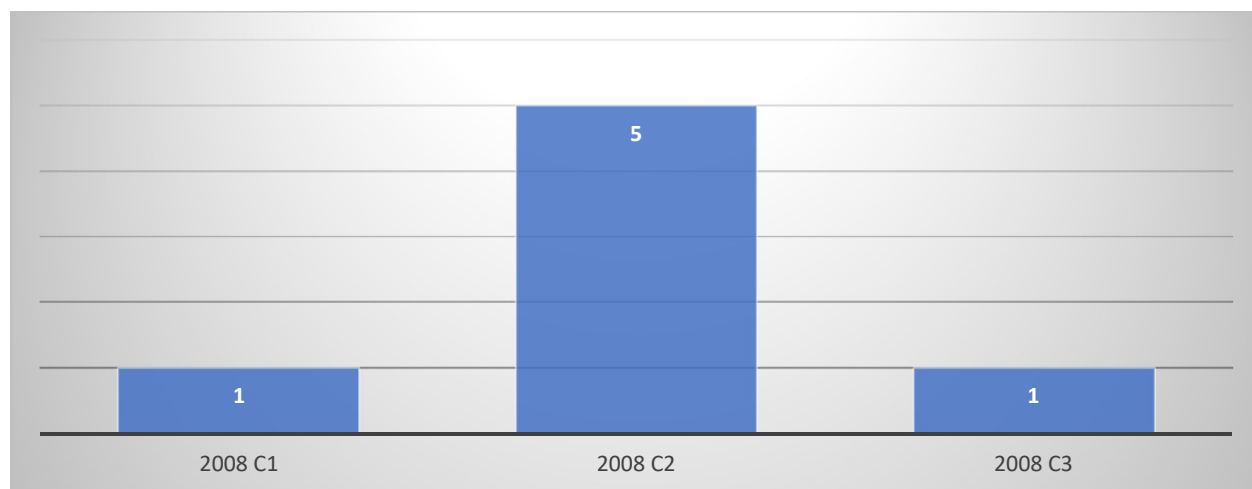


In Graph 8A, the areas of in-service training for teachers and composition workshops seem to be evaluated more often and are perhaps more present in the larger Class 1 organizations than in the smaller groups, but not by a large margin. The areas of pre-school programs, coaching, and long-term partnership evaluations are far more prevalent with the middle Class of group 2-4 orchestras. In the 2005 survey, these items are found under question 31. In the original report by Dr. Myers, a figure indicating evaluation methods was included (Figure 4). These methods are sadly not present in the 2005 or 2008 surveys (See Illustration 4).

**Illustration 4. Percentage of Programs Using Various Evaluation Methods, ca. 1996 (Myers & Thomas, 1996). Used by permission.**

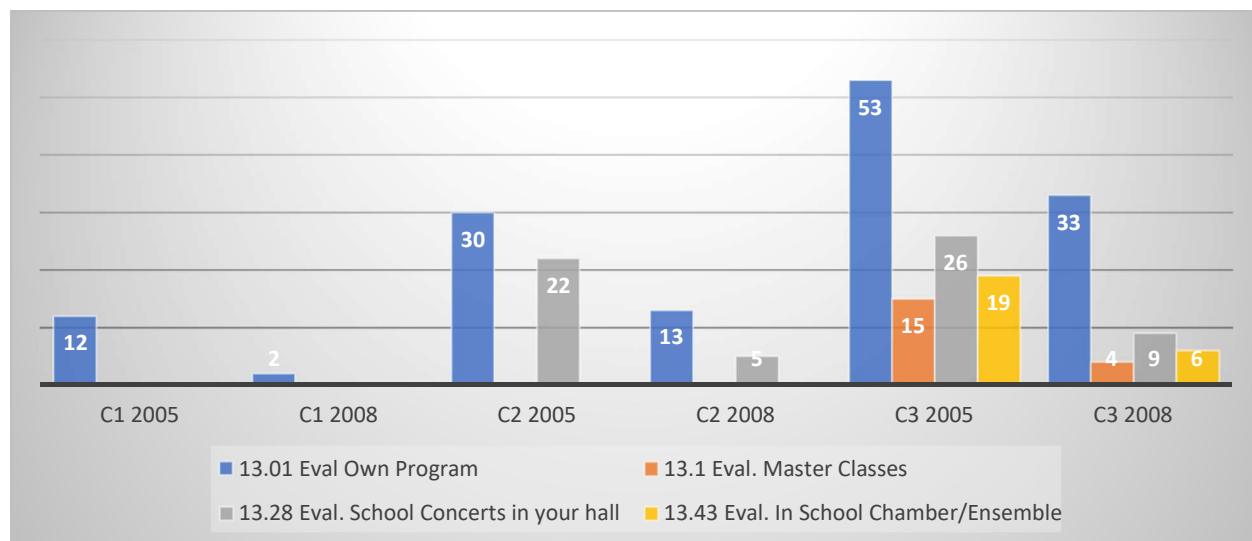


**Graph 8B– Section 13 question comparison across categories within a survey year. 13.35 - Evaluating Programs at Community Facilities.**



In addition, Class 2 orchestras seem more involved in evaluating performances at community facilities, however these represent comparatively small numbers of respondents. Items in section 13 dealing with evaluations of an ed/comm program, Master Classes, School Concerts in Your Hall, and In School Chamber/Ensembles yielded significant results within a Class across both years of surveys (Graph 9). In all Classes, evaluations decreased for these respondents between 2005 and 2008. Quite often, the evaluative process can be very time consuming and cost necessary resources.

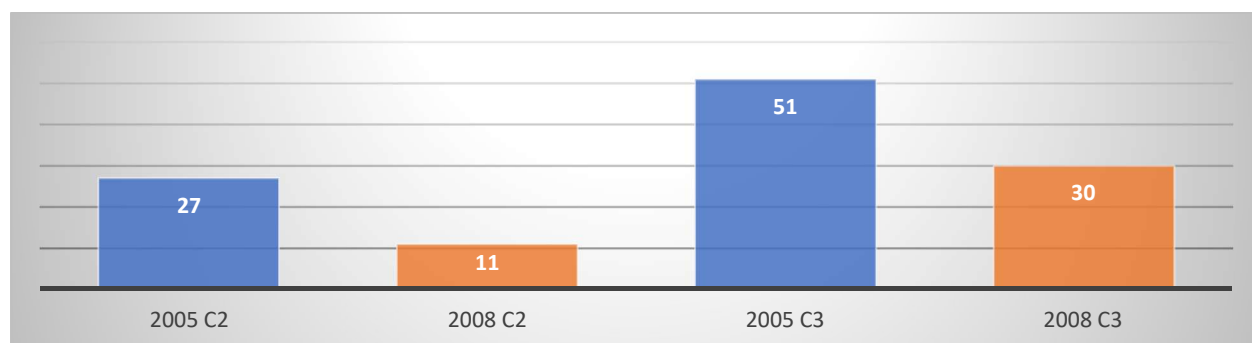
**Graph 9 – Section 13 question comparison across survey years within a category.**



## SECTION 14

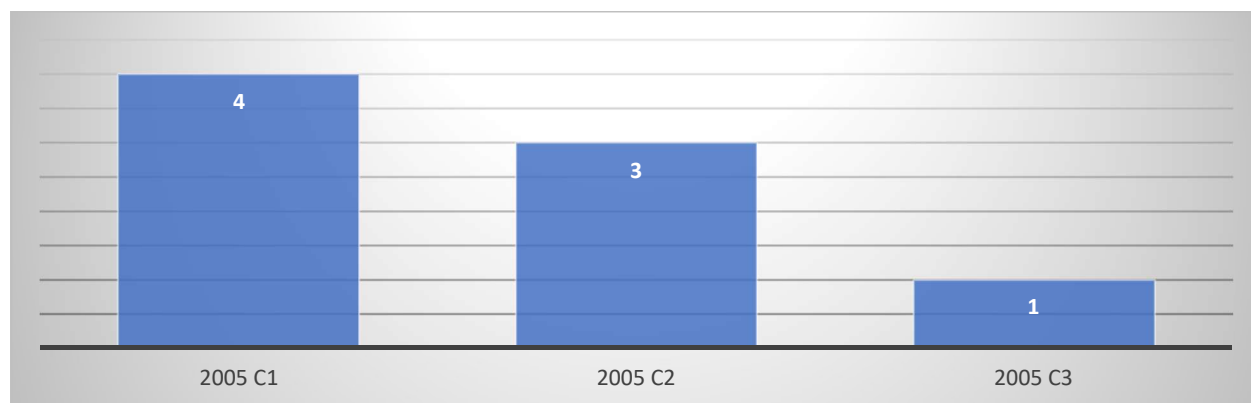
Items in section 14 deal with where the evaluation process is held. These are items 30, 34 and 35 in the 2005 survey. Of these original items, those dealing with evaluations being held in-house for C2 and C3 organizations (Graph 10A), and evaluations that were outsourced for all classes across the 2005 survey (Graph 10B).

**Graph 10A – Section 14 question comparison across years within a category. 14.1 - Evaluations Held In-house.**





**Graph 10B – Section 14 question comparison across categories within a survey year. 14.2 - Outsourced Evaluations.**

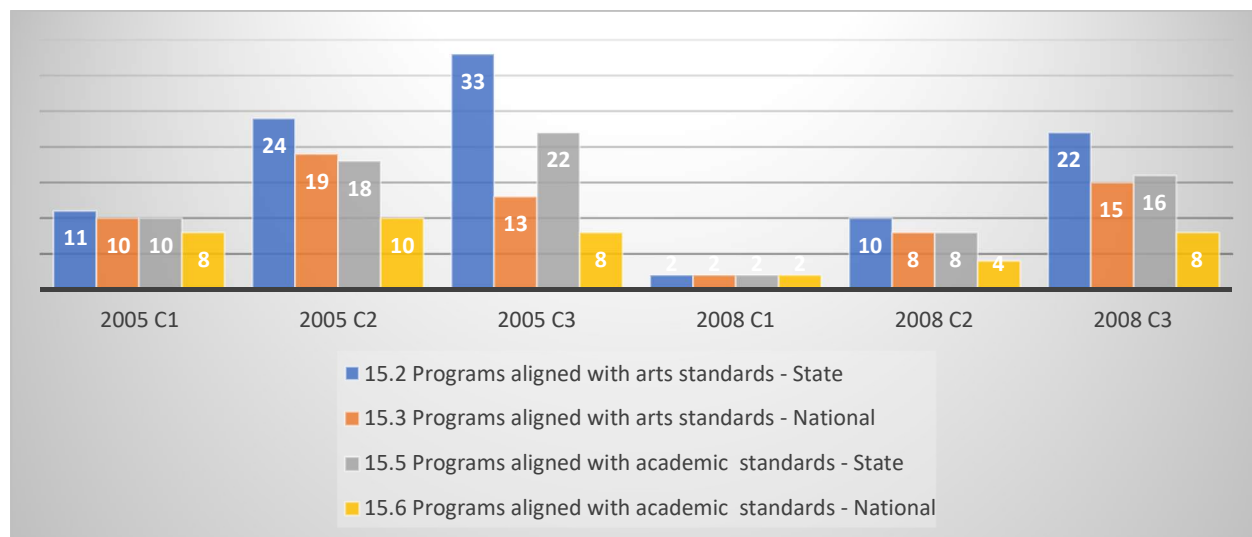


Evaluating a program is a time-intensive project which requires impartiality and documentation. It is very possible that, from 2005 to 2008, Class 2 and 3 organizations reduced the number of evaluations for programs as the number of staff members grew fewer. The data showing that larger groups evaluate programs more often perhaps reflects their higher budgets; however, a cause cannot be determined with the data available.

## SECTION 15

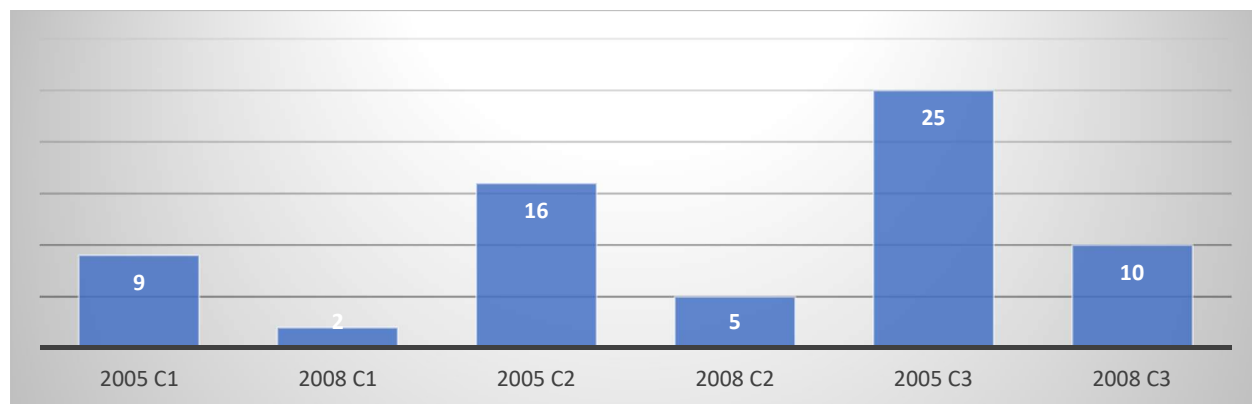
Items in Section 15 pertain to the alignment of programs in an organization's ed/com portfolio to standards-based education, and the level at which those programs are aligned. Federal, state, and local boards of education all promote their own standards, which may or may not match completely. For both 2005 and 2008, arts standards and academic standards for federal and state level educational goals yield significant results (Graph 11). Unsurprisingly, most organizations align their program to state arts standards first. National arts standards and state academic standards are second or third, depending on the year and class, and national academic standards are cited the least often.

**Graph 11– Section 15 question comparison across categories within a survey year.**



Comparing data across all three classes, only the item on Programs aligned with local arts standards yielded statistically significant results (Graph 12). For each class, the number of programs reported to be aligned with local arts standards decreased in each of the two years by more than half. Again, there are not enough data to determine a cause.

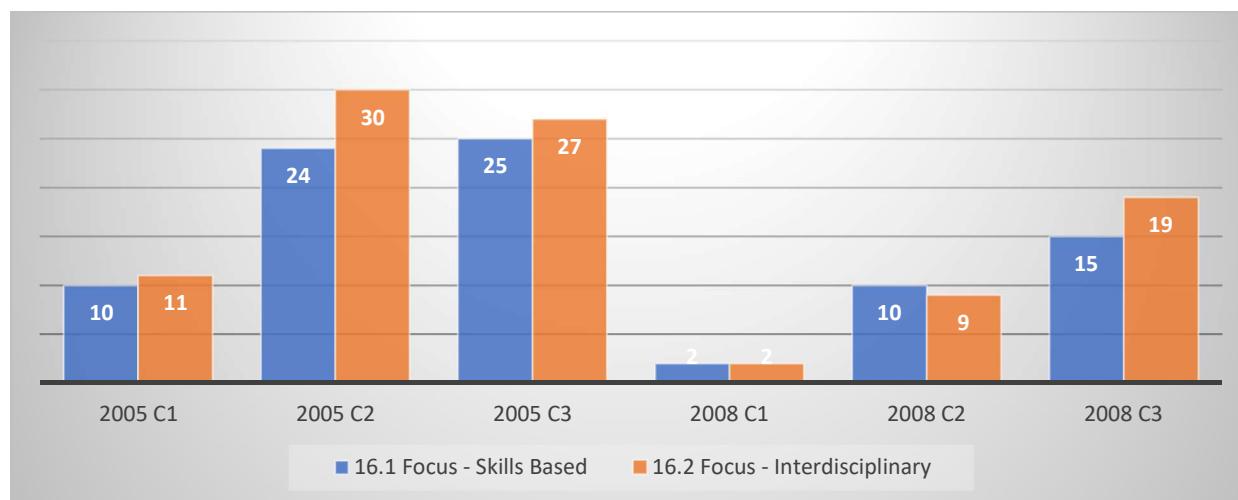
**Graph 12 – Section 15 question comparison across survey years within a category. 15.1 - Programs aligned with standards – Local.**



## SECTION 16

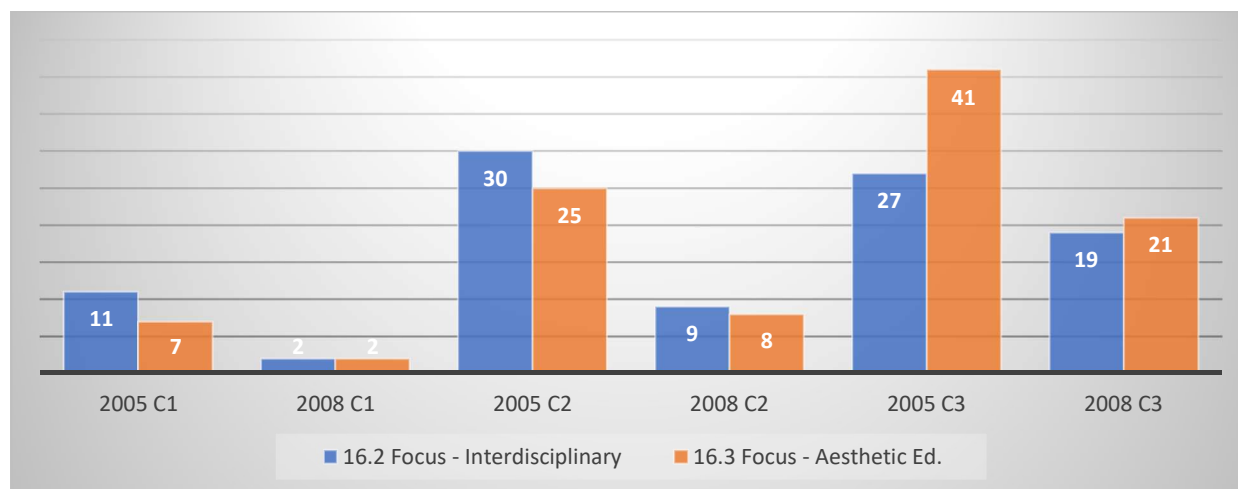
The items in section 16, found as question 35 in the 2005 survey, pertain to the focus of programs in the ed/comm portfolio. Choices are Skills Based, Interdisciplinary, and Aesthetic Education. Only the latter two yielded significant results (Graph 13A and Graph 13B).

**Graph 13A– Section 16 question comparison across categories within a survey year.**



Across classes for both the 2005 and 2008 surveys, the number of organizations identifying programs as skilled or aesthetically based declined considerably. This mirrors a larger attempt to align programs with standards-based education, so it is not surprising that orchestras are working more closely with boards of education to tailor their programs to specific curricula and standards, relying less on generic focus points. In addition, many school systems are moving towards more local control, which necessitates local standards being aligned with state and national standards. Therefore, if orchestras accept the standards of their area schools, they will most likely align themselves with the practices of their partnership classrooms.

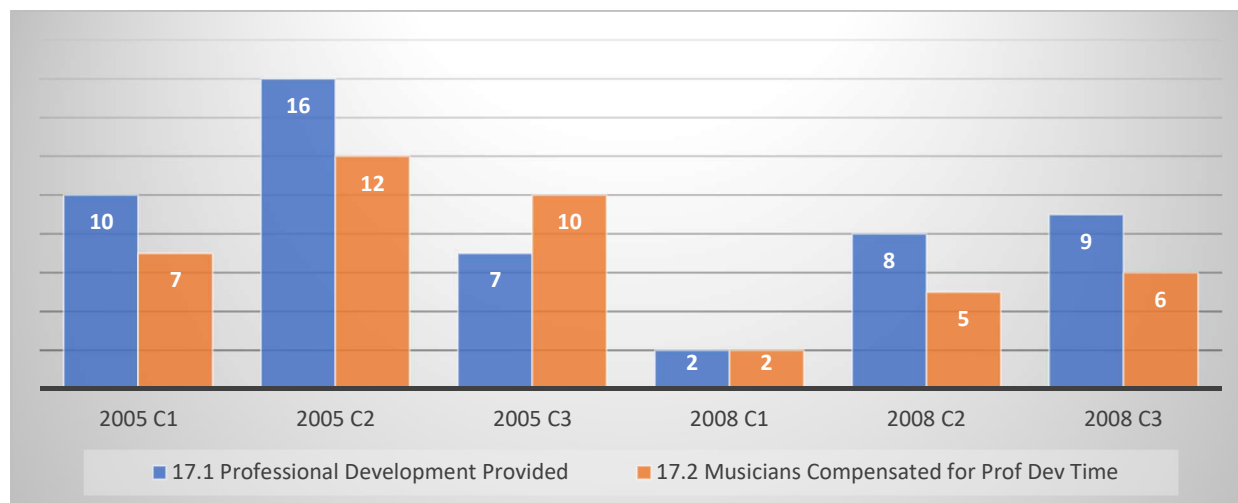
**Graph 13B – Section 16 question comparison across years within a category.**



## SECTION 17

Section 17, questions 36 and 37 in the 2005 survey, concern professional development for musicians involved in ed/comm programs. Large organizations were more likely to provide professional development, with 10 of 12 (83.3%) in Class 1 answering question 36 positively. However, only 7 (58.3%) offered compensation. The number of positive responses to both questions decreased between 2005 and 2008. (Graph 14). The cause is unknown, but budgetary stress due to the economic recession that began in late 2007 may have been a contributing factor.

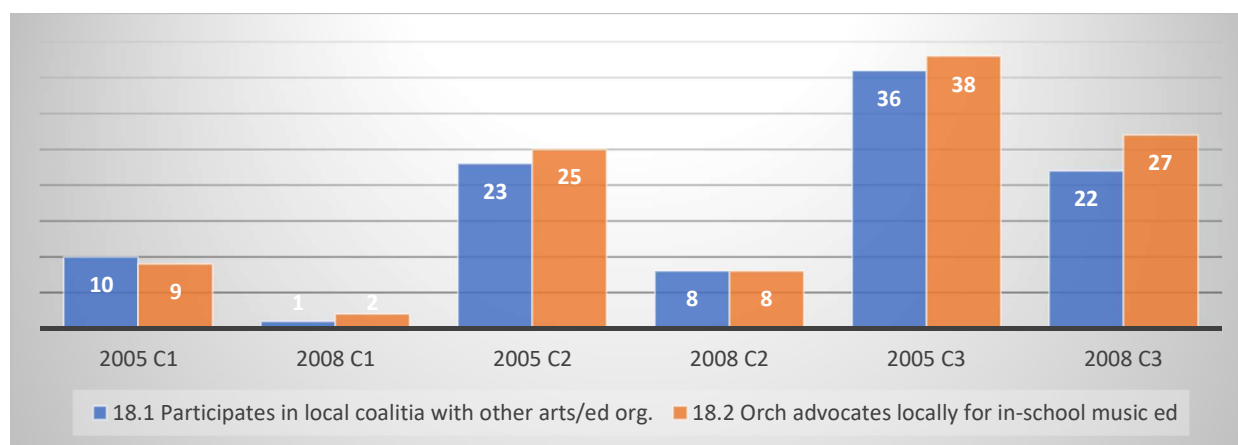
**Graph 14– Section 17 question comparison across categories within a survey year.**



## SECTION 18

Section 18 primarily addresses advocacy and the interaction of the orchestra with other organizations (Graph 15). Data from both survey years yielded significant results across all classes. With a decrease in income and services, advocacy increased to help raise awareness of the importance of funding for the arts in schools.

**Graph 15 – Section 18 question comparison across survey years within a category.**



## SECTION 19

Section 19 focuses on the number of music teachers in the community surrounding the orchestra, and the respondents' perception of an increase or decrease in that number. As this information is requested only in the 2008 survey, it is not statistically relevant to this research.

### **CURRENT STATUS OF OUTREACH AMONG ORCHESTRAS RECEIVING ONSITE VISITS IN 1996**

Data gathering for this study included an email survey of the nine orchestras visited on site by Myers in 1996. A set of open ended questions was emailed to the ed/comm staff of each orchestra. Five responses were received (for the full text of these responses, see Appendix C). After comparing these responses with the results of the site visit published in the Myers Report, the following observations can be made.

#### **ORCHESTRA IOWA**

Orchestra Iowa has kept many of its programs going strong through the last twenty years. The Symphony School Program has been strengthened. It offers a variety of experiences including youth concerts and Music in the Schools, and provides direct strong instruction to students in classrooms. The organization still does not have a formal evaluation process; however, the longevity and intensity of the Symphony School Program is a testament to the orchestra's involvement in their community.

## CHICAGO SYMPHONY ORCHESTRA

Changes in the ed/comm activities of the CSO were initially driven by the construction of Symphony Center, shortly after the publication of the Myers Report. Staffing peaked in 2001 and has been consolidated in the years following. The CSO remains committed to serving its diverse neighborhood, and now works to broaden its reach to a more global audience. With creative consultants like Yo-Yo Ma offering guidance on community engagement goals, the orchestra is able to continue to innovate and remains a leader for engagement.

## NEW YORK PHILHARMONIC

At the time of the Myers Report, the NYP's partnership program, in its second year, served schools in Manhattan. Other offerings were an early engagement website and the historic Young People's Concerts. In the twenty years that followed, the NYP continued to develop new ways to engage with young people. The orchestra has greatly expanded its engagement offerings to include streaming classes, concerts and composition workshops for the young (and very young), an El Sistema program, and a post-graduate training program for young professionals. As community engagement and educational activities have been the cornerstone of this organization since the time of Bernstein, the NYP takes a serious and global approach to outreach and continues to increase its offerings.

## MILWAUKEE SYMPHONY

The Milwaukee Symphony's Arts in Community Education program is still going strong after thirty years of engagement. Their model has remained consistent since the publication of the original report. Current trends include more participatory content while working expansion of current offerings in ways that connect with the diverse population surrounding the orchestra.

## FT. WAYNE PHILHARMONIC

While the Fort Wayne Philharmonic (FWP) has many programs in place to engage their community, none of the programs described in the original Myers Report seem to have survived. Instead, the FWP is centered on a systemic approach to reach students of all levels through various avenues, from youth orchestras to El Sistema-inspired string teaching.

## SUMMARY OF CONCLUSIONS

Although the LOAO reports revealed a substantial number of statistically significant differences in the organization, staffing, and funding of outreach programs, they also show many commonalities. Many orchestras are beginning to fully recover from the Great Recession, and ed/comm outreach organizations of many sizes and budgets are making vigorous efforts to connect with communities and children. Programs with a solid track record have been kept in place. This is often true in spite of turnover in staff; if a program works, new staff members continue to support and even expand it.

The other source of data for this study was the answers to the open-ended questions sent by email to the nine organizations visited by Myers in 1996. Responses from the five orchestras that replied to the survey indicate that the greatest change in educational and community relations



activities in the last twenty years took place during the Great Recession. Strategies adopted to support ed/comm programs included redistributing or consolidating staff and encouraging dedicated giving to ensure long-term community engagement.

Finally, this study attempted to gauge the influence of the Myers Report on the outreach programs of the orchestras profiled individually in the report. The organizations included in the email survey conducted twenty years later were not, according to their directors, influenced by the report itself. In fact, several of the respondents said that no copy of the report could be found in their files; however, they expressed a marked interest in the report and inquired about the possibility of obtaining a copy.

## **SUGGESTIONS FOR FURTHER STUDY**

### **SURVEYS**

As confirmed by the literature, aside from several LOAO surveys and the Myers Report, there is little research available reflecting the state of educational/community outreach by American orchestras. A continuation of LOAO surveys similar to those of 2001, 2005, and 2008 would provide useful up-to-date information and make long-term tracking of activity possible. It is also suggested that the range of orchestras reporting to LOAO surveys be increased to include smaller organizations. The addition of the following questions may broaden the information available and help inform best practices.

- How long has the person currently in charge of education and community outreach held that position?
- To whom does the head of the outreach program report?

- What is the average age of ed-comm programs that have been in place at least two years?
- Are there any El Sistema-derived activities being carried on within the orchestra's outreach? If so, what is the relationship between the activity and the orchestra?

## SITE VISITS

Similar studies of orchestras serving communities of diverse geographical and cultural characteristics would provide a wealth of data. Even with only five organizations responding to the emailed survey used in this study, trends began to emerge. None of these programs showed signs of weakening: two orchestras have kept many of the programs existing in 1996, and three have made considerable strides in innovation. Two organizations had (or were in the process of building) dedicated spaces for their ed/comm activities, which should strengthen their outreach capabilities. Two were involved in global educational activities, and at least two had strong partnerships with students at the university level. Similar data from other orchestras would enable researchers to determine whether the trends identified in the present study are present among other types of orchestras in other parts of the country.

Suggestions for research topics that may contribute to the knowledge base about the status of orchestral communications, outreach, and development programs are as follows.

- Effects of various outreach activities on children of different ages
- Factors inspiring adult's interest in attending and supporting orchestra concerts
- The most effective materials and services provided by outreach programs, in the opinion of K-12 teachers

- Comparison of outreach programs among selected orchestras of various sizes through all parts of the country
- An annotated directory of outreach programs being offered across the country
- In depth study of the administrative systems in orchestras of various sizes, with special attention to funding
- Types and levels of cooperation between orchestra outreach programs and K-12 music teachers.

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## APPENDIX A

### **Introductory Email**

Dear [name of education director],

My name is David Fairchild, and I am a high school band director and a doctoral student in candidacy at the University of Georgia. I am working to update a 1996 report by Dr. David Myers entitled *Beyond Tradition: Partnerships Among Orchestras, Schools, and Communities*, and as such am contacting your organization for information.

In the original report, which was supported by the LOAO and the NEA, nine symphony orchestras were chosen for site visits. These organizations were: The Austin Symphony Orchestra, The Boston Symphony Orchestra, Inc., The Cedar Rapids Symphony Orchestra (Now Orchestra Iowa), The Chicago Symphony Orchestra, The Fort Wayne Philharmonic, The Milwaukee Symphony Orchestra, Inc., The New York Philharmonic and The Pacific Symphony Orchestra.

As your organization is one of the original nine groups which participated in the site visit, I am reaching out to you to help update the original report. In order for this to be as smooth and clear a process as possible, I would like to have a short phone conversation to help aid in any communication we will have, and to clarify the intent of the research. I will then send you five

questions to complete that will serve as a follow up site visit for the report, and a consent form so that you know exactly how this information will be used.

I know this is not part of your regular routine, and I realize this may be a burden on your time. I hope when the research is complete, we will see the many ways which these nine groups utilize their partnerships today and how it differs from the original report. My goal is to show trends in the use of partnerships around the country and aid in informing future partnership choices. I will furnish each group with a copy of the updated report.

Thank you,

David Fairchild



## APPENDIX B

Q	Identifier 2001	Identifier 2005	Identifier 2008
1.1	One Department	One Department	One Department
1.2	Two or More Departments	Two or More Departments	Two or more Dept
1.5	Education	Education	Education
1.6	Marketing	Marketing	Marketing
1.7	Community Relations	Community Relations	Community Relations
1.8	Operations	Operations	Operations
1.9	Other	Other	Other
2.1	Full Time Avg	Full Time Avg.	Full Time Avg.
2.2	FT Avg Tenure	FT Avg Tenure	FT Avg Tenure
2.3	Part Time Avg	Part Time Avg	Part Time Avg
2.4	PT Avg Tenure	PT Avg Tenure	PT Avg Tenure
3.1	Total Expense Budget	Total Expense Budget	Total Expense Budget
3.2	Musician Pay Included	Musician Pay Included	Musician Pay Included
3.3	Ed. Services at Red.Rate	Ed. Services at Red.Rate	Ed. Services at Red.Rate
3.4	NOT PRESENT	Number of orchestras that include youth concert musicians in ed/comm budget	Number of orchestras that include youth concert musicians in ed/comm budget
4.1	Separate Endowment	Separate Endowment	Separate Endowment
4.5	Avg. Amount of Sep. Endowment.	Avg. Amount of Sep. Endowment.	Avg. Amount of Sep. Endowment.
4.6	If No Sep. endowment, % of total endowment for Ed/Comm Relations	If No Sep. endowment, % of total endowment for Ed/Comm Relations	If No Sep. endowment, % of total endowment for Ed/Comm Relations
5.1	Individual	Individual	Individual
5.2	Government	Government	Government
5.3	Corporate	Corporate	Corporate
5.4	Foundation Grants	Foundation Grants	Foundation Grants
5.5	Other	Other	Other
6.1	Ticket Revenue Program	Ticket Revenue Program	Ticket Revenue Program

6.2	NOT PRESENT	Programs rely on Musician Service Exchange?	Programs rely on Musician Service Exchange?
7.01	Youth Orchestra	Youth Orchestra	Youth Orchestra
7.02	Music Learning Center	Music Learning Center	Music Learning Center
7.03	Teacher Training/Regular Classroom Teacher	Pre Service Training for classroom Teachers	Pre Service Training for classroom Teachers
7.04	NOT PRESENT	Pre-Service Training for music teachers	Pre-Service Training for music teachers
7.05	NOT PRESENT	In Service Training for classroom teachers	In Service Training for classroom teachers
7.06	NOT PRESENT	In Service Training for Music Teachers	In Service Training for Music Teachers
7.07	In-School Residencies	In-School Residencies	In-School Residencies
7.08	Assembly Programs	Assembly Programs	Assembly Programs
7.09	Master Classes	Master Classes	Master Classes
7.1	Elementary School Programs	Elementary School Programs	Elementary School Programs
7.11	High School Programs	High School Programs	High School Programs
7.12	Continuing Education Programs	Continuing Education Programs	Continuing Education Programs
7.13	Pre-Concert Lectures	PreConcert Lectures	PreConcert Lectures
7.14	Run-Out Youth Concerts	Run Out Youth Concerts	Run Out Youth Concerts
7.15	Composition Workshops	Composition Workshops	Composition Workshops
7.16	Collaborations w/other groups	Collaborations w other groups	Collaborations w other groups
7.17	Chamber orch concerts in-school	Chamber orch concerts in school	Chamber orch concerts in school
7.18	Full orch concerts in-school	Full orch concerts in school	Full orch concerts in school
7.19	Music School	Music School	Music School
7.2	Instrumental Training	Instrumental Training	Instrumental Training
7.21	Music Specialist Training	NOT PRESENT	NOT PRESENT
7.22	Long-term Partnerships	Long Term Partnerships	Long Term Partnerships
7.23	In-school workshops/coaching	In School Workshops/Coaching	In School Workshops/Coaching
7.24	Preschool Programs	Pre School Programs	Pre School Programs
7.25	Middle School Programs	Middle School Programs	Middle School Programs
7.26	College Programs	College Programs	College Programs

7.27	Special Education Programs	Special Education Programs	Special Education Programs
7.28	Youth Concerts in your hall	School Concerts in your hall	NOT PRESENT
7.29	Classes - music theory, history, etc.	NOT PRESENT	NOT PRESENT
7.3	Competitions	Competitions	Competitions
7.31	NOT PRESENT	Internships	Internships
7.32	NOT PRESENT	Adopt-a-school	Adopt-a-school
7.33	NOT PRESENT	Work-to-school	Work-to-school
7.34	In-school small ensemble concerts	In-school small ensemble concerts	NOT PRESENT
7.35	Family Concerts	Family Concerts in your hall	Youth/Family Con in hall
7.36	NOT PRESENT	Programs at Community Facilities	Programs at Community Facilities
7.37	Other	Other	Other
7.38	Concerts in schools	NOT PRESENT	NOT PRESENT
7.39	Concerts in Religious Institutions	Programs at Religious Institutions	Programs at Religious Institutions
7.4	Concerts in Senior Centers	NOT PRESENT	NOT PRESENT
7.41	Concerts in Other	NOT PRESENT	NOT PRESENT
7.42	Community Perf by Ind. Musicians	NOT PRESENT	NOT PRESENT
7.43	Community Perf by Small Ens.	Community Perf by Small Ens.	Community Perf by Small Ens.
7.44	Community Perf by Chamber Orch	NOT PRESENT	NOT PRESENT
7.45	Community Perf by Full Orch	Community Perf by Orch	Community Perf by Orch
7.46	Collaborations with Religious Inst.	NOT PRESENT	NOT PRESENT
7.47	Collaborations with Choruses	Community Chorus Programs	Community Chorus Programs
7.48	Collaborations with other Inst. Groups	Community Orchestra Programs	Community Orchestra Programs
7.49	Collaborations with Cultural Assoc.	Work with other community arts	Work with other community arts
7.5	Collaboration Perf by Ind Musicians	NOT PRESENT	NOT PRESENT
7.51	Collaboration Perf by Other	NOT PRESENT	NOT PRESENT
8.1	Separate Education Website	NOT PRESENT	NOT PRESENT

8.2	Separate Comm Relations Website	NOT PRESENT	NOT PRESENT
8.3	Ed/Comm Relations on Orch Main Webpage	NOT PRESENT	NOT PRESENT
9	Do Not Tabulate	NOT PRESENT	NOT PRESENT
10.1	Contract with Board of ed, other groups	NOT PRESENT	NOT PRESENT
10.2	Paid Contracts	NOT PRESENT	NOT PRESENT
10.3	Generate Revenue	NOT PRESENT	NOT PRESENT
10.4	Other Collaborations	NOT PRESENT	NOT PRESENT
11.01	NOT PRESENT	Avg. Total Population Served	Avg. Total Population Served
11.02	NOT PRESENT	Total Pre School Students	Total Pre School Students
11.03	NOT PRESENT	Total Elementary Students	Total Elementary Students
11.04	NOT PRESENT	Total Middle School Students	Total Middle School Students
11.05	NOT PRESENT	Total High School Students	Total High School Students
11.06	NOT PRESENT	Total College/Grad Students	Total College/Grad Students
11.07	NOT PRESENT	Total Adults	Total Adults
11.08	NOT PRESENT	Total Music Teachers	Total Music Teachers
11.09	NOT PRESENT	Total Classroom Teachers	Total Classroom Teachers
11.1	NOT PRESENT	Total elementary Schools	Total elementary Schools
11.11	NOT PRESENT	Total Middle Schools	Total Middle Schools
11.12	NOT PRESENT	Total High Schools	Total High Schools
12.01	NOT PRESENT	Total Colleges/Universities	Total Colleges/Universities
12.02	NOT PRESENT	Under 18 Females	Under 18 Females
12.03	NOT PRESENT	Under 18 Males	Under 18 Males
12.04	NOT PRESENT	Under 18 Caucasian	Under 18 Caucasian
12.05	NOT PRESENT	Under 18 African-American	Under 18 African-American
12.06	NOT PRESENT	Under 18 Latino-American	Under 18 Latino-American
12.07	NOT PRESENT	Under 18 Asian-American	Under 18 Asian-American
12.08	NOT PRESENT	Under 18 Other Race	Under 18 Other Race
12.09	NOT PRESENT	Over 18 Female	Over 18 Female
12.1	NOT PRESENT	Over 18 Male	Over 18 Male
12.11	NOT PRESENT	Over 18 Caucasian	Over 18 Caucasian
12.12	NOT PRESENT	Over 18 African-American	Over 18 African-American

12.13	NOT PRESENT	Over 18 Latino-American	Over 18 Latino-American
12.14	NOT PRESENT	Over 18 Asian-American	Over 18 Asian-American
12.15	NOT PRESENT	Over 18 Other Race	Over 18 Other Race
13.01	NOT PRESENT	Eval Own Program	Eval Own Program
13.02	NOT PRESENT	Eval. Youth Orchestra	Eval. Youth Orchestra
13.03	NOT PRESENT	Eval. Music Learning Center	Eval. Music Learning Center
13.04	NOT PRESENT	Eval. Pre Service Training for classroom Teachers	Eval. Pre Service Training for classroom Teachers
13.05	NOT PRESENT	Eval. Pre-Service Training for music teachers	Eval. Pre-Service Training for music teachers
13.06	NOT PRESENT	Eval. In Service Training for classroom teachers	Eval. In Service Training for classroom teachers
13.07	NOT PRESENT	Eval. In Service Training for Music Teachers	Eval. In Service Training for Music Teachers
13.08	NOT PRESENT	Eval. In-School Residencies	Eval. In-School Residencies
13.09	NOT PRESENT	Eval. Assembly Programs	Eval. Assembly Programs
13.1	NOT PRESENT	Eval. Master Classes	Eval. Master Classes
13.11	NOT PRESENT	Eval. Elementary School Programs	Eval. Elementary School Programs
13.12	NOT PRESENT	Eval. High School Programs	Eval. High School Programs
13.13	NOT PRESENT	Eval. Continuing Education Programs	Eval. Continuing Education Programs
13.14	NOT PRESENT	Eval. PreConcert Lectures	Eval. PreConcert Lectures
13.15	NOT PRESENT	Eval. Run Out Youth Concerts	Eval. Run Out Youth Concerts
13.16	NOT PRESENT	Eval. Composition Workshops	Eval. Composition Workshops
13.17	NOT PRESENT	Eval. Collaborations w other groups	Eval. Collaborations w other groups
13.18	NOT PRESENT	Eval. Chamber orch concerts in school	Eval. Chamber orch concerts in school
13.19	NOT PRESENT	Eval. Full orch concerts in school	Eval. Full orch concerts in school
13.2	NOT PRESENT	Eval. Comm Music School	Eval. Comm Music School
13.21	NOT PRESENT	Eval. Instrumental Training	Eval. Instrumental Training
13.22	NOT PRESENT	Eval. Long Term Partnerships	Eval. Long Term Partnerships

13.23	NOT PRESENT	Eval. In School Workshops/Coaching	Eval. In School Workshops/Coaching
13.24	NOT PRESENT	Eval. Pre School Programs	Eval. Pre School Programs
13.25	NOT PRESENT	Eval. Middle School Programs	Eval. Middle School Programs
13.26	NOT PRESENT	Eval. College Programs	Eval. College Programs
13.27	NOT PRESENT	Eval. Special Education Programs	Eval. Special Education Programs
13.28	NOT PRESENT	Eval. School Concerts in your hall	Eval. School Concerts in your hall
13.29	NOT PRESENT	Eval. Competitions	Eval. Competitions
13.3	NOT PRESENT	Eval. Internships	Eval. Internships
13.31	NOT PRESENT	Eval. Adopt-a-school	Eval. Adopt-a-school
13.32	NOT PRESENT	Eval. Work-to-school	Eval. Work-to-school
13.33	NOT PRESENT	NOT PRESENT	NOT PRESENT
13.34	NOT PRESENT	Eval. Family Concerts in your hall	Eval. Family Concerts in your hall
13.35	NOT PRESENT	Eval. Programs at Community Facilities	Eval. Programs at Community Facilities
13.36	NOT PRESENT	Eval. other	Eval. other
13.37	NOT PRESENT	Eval. Programs at Religious Institutions	Eval. Programs at Religious Institutions
13.38	NOT PRESENT	Eval. Community Perf by Small Ens.	Eval. Community Perf by Small Ens.
13.39	NOT PRESENT	Eval. Community Perf by Orch	Eval. Community Perf by Orch
13.4	NOT PRESENT	Eval. Community Chorus Programs	Eval. Community Chorus Programs
13.41	NOT PRESENT	Eval. Community Orchestra Programs	Eval. Community Orchestra Programs
13.42	NOT PRESENT	Eval. Work with other community arts	Eval. Work with other community arts
13.43	NOT PRESENT	Eval. In School Chamber/Ensemble	Eval. In School Chamber/Ensemble
14.1	NOT PRESENT	Eval In House	Eval In House
14.2	NOT PRESENT	Eval Outsourced	Eval Outsourced
15.1	NOT PRESENT	Programs aligned with arts standards - Local	Programs aligned with arts standards - Local
15.2	NOT PRESENT	Programs aligned with arts standards - State	Programs aligned with arts standards - State
15.3	NOT PRESENT	Programs aligned with arts standards - National	Programs aligned with arts standards - National

15.4	NOT PRESENT	Programs aligned with academic standards - Local	Programs aligned with academic standards - Local
15.5	NOT PRESENT	Programs aligned with academic standards - State	Programs aligned with academic standards - State
15.6	NOT PRESENT	Programs aligned with academic standards - National	Programs aligned with academic standards - National
16.1	NOT PRESENT	Focus - Skills Based	Focus - Skills Based
16.2	NOT PRESENT	Focus - Interdisciplinary	Focus - Interdisciplinary
16.3	NOT PRESENT	Focus - Aesthetic Ed.	Focus - Aesthetic Ed.
17.1	NOT PRESENT	Professional Development Provided	Professional Development Provided
17.2	NOT PRESENT	Musicians Compensated for Prof Dev Time	Musicians Compensated for Prof Dev Time
18.1	NOT PRESENT	Participates in local coalitia with other arts/ed org.	Participates in local coalitia with other arts/ed org.
18.2	NOT PRESENT	Orch advocates locally for in-school music ed	Orch advocates locally for in-school music ed
18.3	NOT PRESENT	Orch advocates at state legislature for increase in music ed funding	Orch advocates at state legislature for increase in music ed funding
19.1	NOT PRESENT	NOT PRESENT	Avg. full time music teachers in community
19.2	NOT PRESENT	NOT PRESENT	Avg. part-time music teachers in community
19.3	NOT PRESENT	NOT PRESENT	Orch. Answered increase or no change
19.4	NOT PRESENT	NOT PRESENT	Avg % increase from 5 years ago
19.5	NOT PRESENT	NOT PRESENT	Orch Answered decrease
19.6	NOT PRESENT	NOT PRESENT	Avg % decrease from 5 years ago
19.7	NOT PRESENT	NOT PRESENT	Avg # of musicians who are also full time music teachers
19.8	NOT PRESENT	NOT PRESENT	Avg # of musicians who are also part time music teachers
19.9	NOT PRESENT	NOT PRESENT	Avg # of musicians in MENC

## APPENDIX C ORCHESTRA IOWA RESPONSE

*Karen Liegl, School Manager, Orchestra Iowa School – July 25, 2017*

*1. Briefly outline the history of your position over the last 20 years. How many people have served in this capacity in that time?*

I was hired in 1999 as School Coordinator for Cedar Rapids Symphony School. My primary responsibilities were to staff the School office, oversee logistics, registration, and communication. I was the first to hold this position, reporting to the Orchestra Education Director. No one else has been hired to handle these responsibilities since that time, although our operation assistant has taken on scheduling the outreach programs. As years went on, the position of Education Director was eliminated and my responsibilities grew to take over many aspects of that position. An official description of my current responsibilities is as follows:

Position Title: School Manager

Status: Full Time

Reports to: Chief Executive Officer

Position Summary:

The Orchestra Iowa School Manager is responsible for all operational and logistical aspects of the School and is the primary point-of-contact for faculty, students, parents, and the general public.



## Duties and Responsibilities:

### Administrative

- Manage student registration process (lessons, classes, Youth Concerts, Pied Piper, etc.), oversee entry into Tessitura, coordinate needed materials and merchandise, and reconcile with Finance
- Produce monthly reports for administration, Board and faculty
- Facilitate communication between School, faculty, and students
- Schedule and assign studio space to teachers; schedule recitals as needed
- Track faculty assignments, hours, and contracts; process payroll
- Perform administrative duties associated with the school; order needed supplies
- Produce and distribute School mailings
- Keep 2nd floor free of clutter and in good order (including bulletin boards)
- Coordinate all School activities with the master calendar
- Identify educational trends that may present new opportunities for the School
- Participate in concert/event duty as assigned – specifically those events involving School ensembles (e.g. recitals, Youth Concerts, Discovery Chorus)
- Provide support to patron services, including ticket sales
- Perform other duties as assigned

2. *Were you aware of the Myers Report, is there a copy in your organization that you were aware of, and are you aware of any impact the report may have had on outreach in your organization?*

No, I was not. I've never heard it referred to. Is it possible to have copy for the office?

*3. In what way has outreach changed in your organization in recent memory? Do you anticipate its place in the overall organization increasing or decreasing?*

Orchestra Iowa offers a number of community outreach programs.

### **Music in the Schools**

Music in the Schools (MITS) sends small chamber ensembles of professional musicians to over 140 elementary classrooms throughout Cedar Rapids and Iowa City. In these 30-minute concerts, students are introduced to instruments from the orchestra while laughing, learning, and experiencing exceptional classical music. I anticipate that this program will grow as it is brought to the attention of other surrounding school districts.

### **Youth Concerts**

The Orchestra Iowa Youth Concert Series consists of two 45-minute concerts including a fall performance designed for elementary students (at the 4th grade level) and a spring performance geared towards middle school students (7th grade level). Each concert is packed with engaging orchestral works that relate to specific curricular objectives and age-appropriate dialogue, coupled with the sounds of Orchestra Iowa. Educators receive a Youth Concert curriculum guide with teaching resources and information about the concert, as well as musical excerpts of the featured repertoire. Students from the Cedar Rapids Community School District are all included under the terms of the district partnership agreement, and schools from the surrounding districts are offered admission for a modest fee. I anticipate the program will grow as marketing efforts move further afield and the program becomes known in places that do not have easy access to a symphony orchestra.

## **Fifth Grade Fiddles**

The Fifth Grade Fiddles program is a set of group violin lessons offered by the Orchestra Iowa School to all students in the Cedar Rapids Community School District during their fifth grade year. There is no cost to CRCSD students for the set of ten 45-minute lessons. Students learn how to hold, play, and even perform with the violin. This fun and focused course finally culminates in a showcase where students can perform a piece for parents and invited guests.

The Purpose of Fifth Grade Fiddles is to:

- Increase knowledge of and appreciation for music, especially that of the string instrument family, through a hands-on approach.
- Promote continued participation in music ensembles/classes in middle and high school.
- Integrate fifth grade standards and student learning expectations, including:
  - 21st Century Skills (Health and Civic—personal and community health & social skills such as listening skills, concentration, following directions, fine-motor skills, healthy activities, etc.)
  - Music (understanding music concepts including rhythm and melody, playing instruments and understanding the string family)
  - Social Studies (how music serves as an expression of culture/society, interdependence of group & individuals, etc.)
- (See detailed 5th grade learning expectations on the CRCSD Webpage at: [www.cr.k12.ia.us/aboutUs/curriculum/index.cfm](http://www.cr.k12.ia.us/aboutUs/curriculum/index.cfm) )

The program is plagued with an assortment of difficulties. It is hard to find teachers willing to teach in public school classrooms. The instruments need to be inventoried and maintained in good working order, an expensive and never-ending process that takes an OI staff member to oversee. Not all members of the community school faculty are excited about taking classroom time away from their students for the 10 lessons. Scheduling is a nightmare as we talk to different staff members/positions in each school and have to coordinate between the school schedule and the FGF teacher's schedule. Setting it all up real challenge to start with and all goes down the tubes with a few snow days thrown in.

A strong sense of purpose keeps the program functioning, as many believe it is a valuable tool for recruiting students to a string instrument program, as opposed to band, but it seems possible that it is the least likely of the outreach programs to survive long term.

### **Pied Piper**

Orchestra Iowa's Pied Piper program introduces preschool-aged children throughout Cedar Rapids, Marion, and Iowa City to the String, Brass, Woodwind, and Percussion instruments of the orchestra through free 30-minute chamber concerts. Presented in partnership with local libraries and sponsored by local organizations, Pied Piper is the perfect way for parents to introduce their children to the orchestra through music, education, and fun.

*4. In your opinion, what are the major factors, particular to your organization, that limit or aid in the status of outreach?*

We are privileged to have a partnership agreement with the Cedar Rapids Community School District which provides for the scope of the outreach programs in the school district. This

unique working relationship makes all possible. Likewise, local libraries find the organization a valuable source of programming for the early childhood student. Employing musicians for programs like

“Pied Piper” allows the organization to tap into contracted services which may not be needed for the regular performance season.

Like any other organization, we are limited by available funding, and secondarily, by faculty available and willing to teach outside of the traditional lesson situation. While some schools look at programs such as “Fifth Grade Fiddles” as valuable recruitment tools, there are some who see it as an intrusion into their precious time with students.

*5. What evaluative process do you use to determine the viability of an outreach program? How do you decide which programs to choose for the next cycle?*

Certainly, attendance figures in to the decision to continue. If numbers are healthy, it is a good sign that the program is serving the needs of the community. We also look for direction to the members of the music faculty in the community schools to see how their needs have changed and take suggestions to implement and grow the programs. There is no formal evaluation process.

#### CHICAGO SYMPHONY ORCHESTRA RESPONSE

*Jon Weber, Director of School and Family Programs, the Negaunee Music Institute at the Chicago Symphony Orchestra - October 6, 2017*

*1. Briefly outline the history of your position over the last 20 years. How many people have served in this capacity in that time?*

On October 4, 1997, the Chicago Symphony Orchestra opened Symphony Center, a significant expansion of artistic, administrative and support spaces and a major renovation of Orchestra Hall. Educational programming grew significantly at that time, including the development of community residencies and the opening of the technology-driven ECHO educational center. At that time, the Education and Community Engagement programming that is now administered by the Negaunee Music Institute was divided across a number of departments. At its peak in the 2000/2001 season, there were six departments or branches—Community Relations, Continuing Education/Special Events, Civic Orchestra, Education, Youth Education, and the Eloise W. Martin Center (ECHO)—with a total of 20 staff. After 9/11, the orchestra’s EdCE expanded programming became unsustainable. Between the beginning of the 2001/02 season and the end of the 2002/03 season, EdCE staffing was reduced to 9 and by the end of the 2004/05 season, programming and staff were consolidated into a single department with a staff of 7. The department has stayed roughly the same size over the last 12 years. Understanding that EdCE programming was divided across a number of departments, there have been 3 staff in the director (or vice president) position since 1995: Holly Hudak, Charles Grode, and now Jonathan McCormick.

*2. Were you aware of the Myers Report, is there a copy in your organization that you were aware of, and are you aware of any impact the report may have had on outreach in your organization?*

We were not aware of the Myers Report prior to your message this summer. I don’t know if there is a copy in our files or archives. If you are willing to send one, I’d be grateful.

*3. In what way has outreach changed in your organization in recent memory? Do you anticipate its place in the overall organization increasing or decreasing?*

In 2008, our programs were consolidated into the Institute for Learning, Access, and Training. It has its own advisory board, with approximately 60-70% of board members also serving on the CSO Board of Trustees. In 2014, the Institute was renamed the Negaunee Music Institute with a significant endowment gift. Today, Education and Community Engagement initiatives are more important than ever. The Institute makes the work of the CSO accessible to students and community members in Chicago and across the world where the orchestra tours. The personal impacts of these programs appeal to donors, which helps to support the long-term viability of the organization.

*4. In your opinion, what are the major factors, particular to your organization, that limit or aid in the status of outreach?*

Beyond the shifts in administrative structure and staffing described above, education and community engagement programming have evolved over the last 10-15 years due to a number of factors: marginalization of music education in Chicago Public Schools (since 2012, there have been sizeable gains and improvements); development of instrumental programs inspired by El Sistema, offered by several organizations in Chicago (though not the CSO); financial challenges due to the 2008 recession which required us to find efficiencies between programs and conclude a couple programs that were less than optimized; the influence and inspiration of Yo-Yo Ma, the CSO's Judson and Joyce Green Creative Consultant since 2009/10; efforts since 2012 to increase access, equity, and quality in arts education in Chicago Public Schools; deepening commitment to collaboration and responsiveness to community and partner needs; collaborative efforts across

Chicago to support the musical development of young musicians of color; planning for the centennial anniversaries of the Civic Orchestra and the CSO's concerts for children in 2018/19.

*5. What evaluative process do you use to determine the viability of an outreach program? How do you decide which programs to choose for the next cycle?* (Given in a phone interview on June 20, 2018)

In around 2013, evaluation consultants were used to develop processes to develop programs as some had regular evaluations and some rarely had evaluations. These are based on requirements by funders. Most money does not come from governmental or civic sources

Using the third-party evaluation helped inform decisions on keeping or changing programs in the portfolio. The firm used a similar set of metrics for each program. Quality of design, funding, number of participants, supporting strategic priorities, and synergy across programs and resources. Concert series for young children should lead to the next concert series. One of the goals of the consultancy was to manage it on an ongoing basis, which results in an intensive relationship with the firm, and was unsustainable on an ongoing basis. After the multiyear process, the orchestra took over the evaluative process. Changing the language of evaluations to match a program, defining scope and scale of a specific program are some aspects of evaluation that have changed. In a three-year process, most or all of the programs in the portfolio are evaluated. At the beginning of each year, evaluations are determined based on criteria set by the organization. These are set for a variety of reason which include the newness of a program, looking at a program that may have changed in a certain amount of time, or finding reasons. Other voices at the table come from inter and intra- partner personnel and colleagues



from other organizations. Evaluation is valuable and labor intensive, and must be balanced with the needs of the organization.

An example of external evaluative voices would be those from a public school system or artistic directors from an associated theater company. A full portfolio of programs are in place. New programs are only put in place for a specific reason like funding or opportunity. These are usually based on staff and supervisors input.

In 2013-2014, partnerships with Chicago public schools were re-evaluated as art staffing in public education were reduced and the professional development. The program began in 1998, however growing out of citywide planning from 2009-2012, there was a big movement to expand arts education in the district. Shifts in arts staffing and instructional minutes, combined with a positive shift from schools towards more art ed in classrooms that worked specifically for those sites. Schools with less opportunities were not being served in the same way that the organization desired with the onset of the program. After a year or so of research into other possibilities, the program was replaced with both a residency program directed towards specific schools based on needs, and a program directed towards more high functioning schools with more capabilities on site.

A second example would be of working on a new opportunity that may be based on additional funding. In the last 18 months, they looked at a way to respond to gun violence in Chicago. After intensive planning, the program has not yet been assessed formally, but looks and feels tremendously impactful, and there is a commitment to see that program work in the future and continue, based on an external prospective from Yo-Yo Ma, who works in residency with the orchestra. The program works through large scale events as concerts for peace in partnership with church choirs from the south side of the city and which have brought attendees from all

around the city with proceeds going to faith based groups who work for employment opportunities for at risk population and other things. There is also a song writing project through the partner church, facilitated with the orchestra, who perform the written songs. These live on [notesforpeace.org](http://notesforpeace.org), which is owned by the church.

## NEW YORK PHILHARMONIC RESPONSE

*Theodore Wiprud, Vice President, Education, New York Philharmonic - October 18, 2017*

*1. Briefly outline the history of your position over the last 20 years. How many people have served in this capacity in that time?*

The position originated in 1970, the first such position as far as I've been able to determine. 20 years ago, Polly Kahn was in the position; in 2001 Tom Cabaniss succeeded her. I came on in 2004, the fifth person in the job. The title was Director of Education. My title was elevated to Vice President, Education in 2012. During my time, our programs have greatly expanded; my predecessors focused a good deal on our in-school work in NYC schools. My focus has widened a good deal to encompass all our concert programming, international partnerships, and managing a growing staff and teaching artist faculty.

*2. Were you aware of the Myers Report, is there a copy in your organization that you were aware of, and are you aware of any impact the report may have had on outreach in your organization?*

I am aware of Beyond Tradition – it's legendary – but I can't put my hand on a copy here,

surprisingly. Since it predated my time here, I'm not aware of its impact, if any.

*3. In what way has outreach changed in your organization in recent memory? Do you anticipate its place in the overall organization increasing or decreasing?*

As mentioned, “outreach” (a term we don’t use anymore – instead, “engagement”) has expanded a lot in these 20 years. At the time of BT, we had the series of Young People’s Concerts, a pioneering School Partnership Program in NYC elementary schools, and an online learning site that was cutting edge for its time. Since, we’ve added a Very Young People’s Concerts series (extremely popular), the Very Young Composers program that has affiliates all over the world and has proven influential in thinking about children’s creativity; the Insights Series of adult lectures with live performance; the new online learning site Young People’s Concerts Play! – designed for classroom and home streaming of Young People’s Concerts with participatory activities; and created Global Academy, a post-graduate training program for young professionals, with a counterpart working with El Sistema students in NYC. At the same time we’ve doubled the school-day work and deepened the pedagogy, and tripled the scope of Young People’s Concerts for Schools.

On this evidence the place of education and engagement has greatly expanded, and I anticipate it expanding dramatically further in the next few years under new management here.

*4. In your opinion, what are the major factors, particular to your organization, that limit or aid in the status of outreach?*

Probably our relatively stable funding, stemming from endowment funds supporting our core educational activities, have enabled us to be somewhat entrepreneurial even in down

economic times. More important, it's in the DNA of the New York Philharmonic – Bernstein's orchestra – to take learning and audience engagement very seriously and to push for the very best product and outcomes.

*5. What evaluative process do you use to determine the viability of an outreach program? How do you decide which programs to choose for the next cycle?*

Each program has its own evaluation means, mostly based on end-user evaluations (audience and teacher surveys, for instance). All programs are long-term commitments. Those we have dropped along the way were serving relatively few people for relatively high cost, and by trimming those we have been able to focus more resource on core programs with deep impact.

#### MILWAUKEE SYMPHONY RESPONSE

*Karli Larsen, Director of Education, Milwaukee Symphony Orchestra – January 4, 2018*

*1. Briefly outline the history of your position over the last 20 years. How many people have served in this capacity in that time?*

There have been four education directors during this time span, and seven ACE managers. There was a period of at least 5 years between when I became the Director of Education (2010) and the previous Director. During that time, the MSO education department consisted of two managers, one exclusively dedicated to ACE.

*2. Were you aware of the Myers Report, is there a copy in your organization that you were aware of, and are you aware of any impact the report may have had on outreach in your organization?*

I have read the Myers Report, as we do have a copy in the office. However, I am unsure about the impact that report had on the organization.

*3. In what way has outreach changed in your organization in recent memory? Do you anticipate its place in the overall organization increasing or decreasing?*

In itself, the word “outreach” is changing to reflect relationships with our partners that are two-way, dynamic and responsive. We often refer to our work as “community engagement” or “community impact” instead. As with most orchestras across the country, the Milwaukee Symphony is always looking to make its education and community offerings even more robust. In particular, we seek to create an organization and audience that is as diverse as the community we serve. Our programming has changed to be more interactive and/or participatory, such as including Carnegie Hall’s Link Up programming in our Concerts for Schools portfolio, and we seek to measure our impact in both quantitative and qualitative ways.

*4. In your opinion, what are the major factors, particular to your organization, that limit or aid in the status of outreach?*

The Great Recession rocked orchestras across the country, and the Milwaukee Symphony was not immune. Budgets and deficits were very tight and didn’t allow for expansion of staff or programming for several years. We are excited to be advancing a capital campaign for our own building, which will provide the financial stability needed to develop, implement, and evaluate new programming, as well as cultivate new sources of funding for them.

*5. What evaluative process do you use to determine the viability of an outreach program? How do you decide which programs to choose for the next cycle?*

We prefer to create and/or implement education programs that are high-quality, have high-impact, have the capacity to build long term relationships and are scalable. This is why we have been dedicated to continuing the ACE program for nearly 30 years!

#### FORT WAYNE PHILHARMONIC RESPONSE

*Jason G. Pearman, Director of Education & Community Engagement - Jun 13, 2018*

*1. Briefly outline the history of your position over the last 20 years. How many people have served in this capacity in that time?*

The Director of Education position has remained a constant fixture within the Fort Wayne Philharmonic. Throughout the years, there have been many configurations of the department which have contained numerous positions (i.e. youth orchestra manager, regional partnerships director, regional partnerships manager, education assistants, community engagement managers/assistants). These positions have been added and eliminated throughout the years. The one constant has been the Director of Education position. How many people have served in this capacity in that time? – Due to an immense amount of turnover within the organization, there have been approximately seven (7) people who have served in this position over the last twenty years.

*2. Were you aware of the Myers Report, is there a copy in your organization that you were aware of, and are you aware of any impact the report may have had on outreach in your organization?*

[Were you aware of the Myers Report] No, [is there a copy in your organization that you were aware of] – not that I am aware of, [and are you aware of any impact the report may have had on outreach in your organization?] – No

*3. In what way has outreach changed in your organization in recent memory? Do you anticipate its place in the overall organization increasing or decreasing?*

Currently, more outreach is focused on creating long term impact in schools in what the Fort Wayne Philharmonic refers to as our Generation Initiative. The Generation Initiative seeks to involve students musically from age 3 to college. Early Childhood programs teach basic music concepts, Orff percussion, etc.; grades 2-5 learn violin through our partnership with Fort Wayne Community Schools in a program called Club Orchestra; students in grades 6-8 further their musical learning in the Philharmonic's Junior Strings program; students in grades 9-12 participate in the Philharmonic's Youth Symphony Orchestra program. Finally, a partnership with the FW Purdue University School of Music is being developed to help students continue in their music studies and to develop lifelong patrons of the arts. [Do you anticipate its place in the overall organization increasing or decreasing?] -Increasing.

*4. In your opinion, what are the major factors, particular to your organization, that limit or aid in the status of outreach?*

Outreach is limited by many factors such as: financial, CBA guidelines, staffing, community demand, artistic decisions, etc.

*5. What evaluative process do you use to determine the viability of an outreach program? How do you decide which programs to choose for the next cycle?*

Reviewing school data to look at the impact of attendance, test scores, etc. Surveys are also sent to schools and attendees---results are tabulated to measure engagement and effectiveness. Other processes include evaluating audience attendance, comparing totals from previous years to analyze increases/decreases in audience. [How do you decide which programs to choose for the next cycle?] – Programs that meet the benchmarks created within the organization are re-engaged for the future.