Changing Times:

A study of change management and institutional innovation within theatre organizations
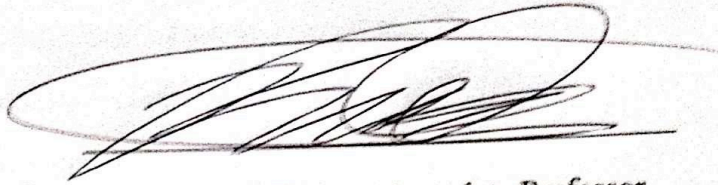
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University of Oregon

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A MASTER'S PROJECT

Presented to the Arts and Administration Program of the University of Oregon in partial fulfillment of the requirements for the

Degree of Master of Science in Arts Management

Approved by:

Dr. Patricia Dewey, Associate Professor

Arts and Administration Program

University of Oregon

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Education

Master of Science (Arts Management), University of Oregon   **2011**

Coursework including: Programming, Artist Relations, Touring, Venue Management, Cultural Policy, Media Management, Marketing, Arts Education, Website Development, Graphic Design, Collateral Development, IP Law. Terminal research project on change management and institutional innovation within theatre organizations.

Theater Communications Group: Leadership Bootcamp   **2010**

Selected as one of 20 theatre organizations in the United States for an intensive bootcamp seminar on organizational management, change management, and personal leadership development.

Bachelor of Liberal Arts (Theatre), The Evergreen State College (Olympia, WA)   **2004**

Coursework including: Directing for the Stage, Performing Arts Management, Stage Management, Touring, Performance Theory, Scenic Design, Lighting Design, Folklore, Education, Puppetry.

Professional Experience

CENTRAL HEATING LAB INTERN: ACT Theatre (Seattle, WA)   **2011**

<u>Programming</u>: Development of an application process for Central Heating Lab (CHL) partner artists.

<u>Event Management</u>: Scheduling and budgeting for partner artists within IATSE regulations. Creation and execution of reporting for CHL events as a solution to interdepartmental communication needs, integrating first hand artistic analysis with financial and attendance reports from Tessitura and information provided by technical and house staff.

<u>Administrative</u>: Research and development of ACT's 501(c)(3) Fiscal Sponsorship program, resulting in a comprehensive document for artists and administrators, including concise description of the program and legalities and creation of reporting forms, evaluation process, and application.

COMMUNITY EVENTS INTERN: City of Eugene Summer in the City (Eugene, OR)   **2011**

<u>Programming</u>: Developing programming with staff for the City of Eugene's Summer in the City – Downtown and Live Music. Including development of nine downtown events and six concerts in local parks.

<u>Event Management</u>: Networked event development through the City of

Eugene's Ungerboeck Events Management Software, Creation of Day-of Event Management Systems and Contact Information Forms to be used at over 20 Summer in the City events.

Artist relations: Contracting, Fee negotiation, Collection of riders, stage diagrams, artist images and biographies for Summer in the City -- Downtown and Live Music events.

Marketing: Development of short and long form event descriptions, Poster, trifold and banner outlines, Website updates, Extensive use of Eugeneagogo.com.

OFFICE ASSISTANT: Arts and Administration Department, UO (Eugene, OR)   2010-2011

Administrative: Provided support for office manager, program manager, adjuncts and five member faculty. Database management of graduate applicant pool. Copying, mailing, ordering supplies and other office duties as needed.

Archival: Cleared, sorted, and archived three decades of organizational documents.

Customer Service: Answered student questions, gave directions, provided guidance as applicable.

PRODUCTION MANAGER: Lord Leebrick Theatre Company (Eugene, OR)   2008-2010

Event Management: Facilitation and management of eight show season. Modification of volunteer management systems.

Artist Relations; Contracting designers, directors, actors and stage management. Coordination of technical staff, designers and stage management.

Technical: Master Electrician for eight show season. Design, coordination, and upkeep of theatrical lighting, sound and projection systems. Set build and paint as needed.

Facilities Management: Interim Property Manager for 10 spaces managed by LLTC. Served as a liaison to the board on a major redevelopment project. Facilitated creation of main offices, two rehearsal spaces, costume shop and storage, scene shop, and staging area.

PRODUCTION RUNNER: ACT Theatre (Seattle, WA)   2006–2007

Event Management: Coordination of catering, logistics and venue setup for Opening Night Gala, Production Dinner and Meet and Greet events with between 40-150 attendees.

Technical: Production Runner for the theatre's production department. Research and procurement of materials.

Administrative: Provided support for six person production office and artists. Copying, faxing, mailing, ordering supplies and other office duties as needed.

COMPANY MEMBER/MASTER ELECTRICIAN: Live Girls! Theater (Seattle, WA)   2005–2007

Event Management: Assisted in organization two major fundraising events, and five Opening Night Gala's with 50-75 attendees.

Technical: Design, coordination and execution of theatre lighting systems. Served as stage manager, director and designer for shows, cabarets and events.

PRODUCTION INTERN: Perseverance Theatre (Juneau, AK)

2004-2005 Event Management: Assistant Stage Manager of two main-stage productions, Venue Management of second-stage venue. Driver and chaperone for visiting artists.

Archival: Cleared, sorted, and organized twenty-five years of organizational documents.

Education: Assistant teaching and Production Management of Perseverance Theatre's theatre program at University of Alaska Southeast.

Administrative: Provided support for eight person office, local and visiting artists. Copying, faxing, mailing and other office duties as needed.

Abstract:

This research examines how theatre organizations implement innovative changes within their organizations by analyzing three theatre companies and highlighting new initiatives and models that they have created. This study perceives theatre organizations as complex adaptive systems, wherein departments serve as parts of the greater organization. The conceptual framework illustrates how three major influences (the economy, changes in artist and audience needs, and changes in labor forces) exact pressures upon theatre organizations. This study examines three theatre institutions, defining whether their organizations have implemented institutional innovation, and highlighting methods of change management within their structure.

Keywords:

Table of Contents:

Part 1: Introduction:

1.1 Problem Statement and Significance:

The American Regional Theatre system is experiencing a time of change[1] and turmoil. The world is changing economically and culturally. Theatre Communications Group, the field's national professional organization, reports that seasonal subscription sales are at a five-year low, having dropped by 8.5%, and funding sources are shifting (Voss, Voss, Schuff & Rose, 2010). A new generation of employees is entering the work force, a creative class with different needs from their baby boomer predecessors (Dimaggio, 1991; Florida, 2002; Halpern, 2006). Working from the theory that theatre organizations are complex adaptive systems[2] of diverse autonomous parts that relate to and interact with each other as a whole, this research presents case studies on three institutions that are reacting to external and internal forces. Furthermore, this research examines changes these institutions have made at a programmatic level as well as an institutional level, and the ways these changes have been implemented, particularly examining institutional innovations[3] within the past five years. The resulting study provides an understanding of how sampled organizations react to and implement change.

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[1] Change: 1 *a*: to make different in some particular : alter *b* : to make radically different : transform *c* : to give a different position, course or direction to 2 *a* : to replace with another *b* : to make a shift from one another : switch (Change, 2010)

[2] Complex Adaptive Systems: An entity consisting of many diverse and autonomous components or parts (called agents) which are interrelated, interdependent, linked through many (dense) interconnections, and behave as a unified whole in learning from experience and in adjusting (not just reacting) to changes in the environment (CAS, 2010)

[3] Institutional Innovation: Instances of change that provide new pathways to fulfilling the mission, are discontinuous from previous practice, and result from a shift of underlying organizational assumptions (James Irvin Foundation, 2006)

1.2 Background to the Research Question:

In May 2010, while attending a conference in Seattle, I had the opportunity to sit with a colleague and discuss changes that were occurring within the theatre institution he worked for. I was aware of some significant shifts in programming and was interested in getting an insider's view on how those changes were playing out. Through the course of the conversation I became more interested in how those changes were being made, and what the effects were on the institution's internal culture.

A few months after that conversation, I was invited to attend a leadership training session hosted by Theatre Communications Group (TCG) in conjunction with the annual TCG Conference. The training session and the conference were focused on the need for change and how organizations move from identifying change to creating action. I was able to attend a very valuable session where members of A Contemporary Theatre, Bedlam Theatre, Arena Stage and Portland Center Stage, discussed how their organizations were working to become cultural centers, opening their doors to their communities and broadening the scope of their programming. For me, this signifies a shift from an elite theatre culture to a more populist vision of our institutions. The word innovation was brought up many times at that conference as organizations were looking toward creating a culture of innovation within their institutions as a whole, a broader focus than creating a new program.

Again, these ideas were breached at the 2010 Oregon Arts Summit when keynote speaker Richard Evans spoke about how his organization, EmcArts, addressed the need for institutional innovation and created systematized methods for enacting those changes. Finally, I was

beginning to see a change management[4] method specifically designed for creating the pattern of changes I had witnessed. This conference solidified my research focus and my final research question:

How do theatre organizations use change management tools to implement institutional innovation?

1.3 Conceptual Framework:

The conceptual framework of this research project (figure 1) begins with the assumption that shifts in the current landscape of economics, labor and participation are placing pressure on regional theatre institutions to implement changes in their organizations. I explore how the institutions have reacted to these shifts by focusing on partnerships, programming, and venue, while allowing space for institutions to provide examples of other arenas of change as applicable. I am specifically focusing my attention on groundbreaking new initiatives, and how organizations create room for innovation within their organizational structure. Through this research, I have examined the processes that institutions have used to manage change within their organizations.

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[4] Change Management: Change management is the process, tools and techniques to manage the people-side of business change to achieve the required business outcome, and to realize that business change effectively within the social infrastructure of the workplace. (Hiatt, n.d.)
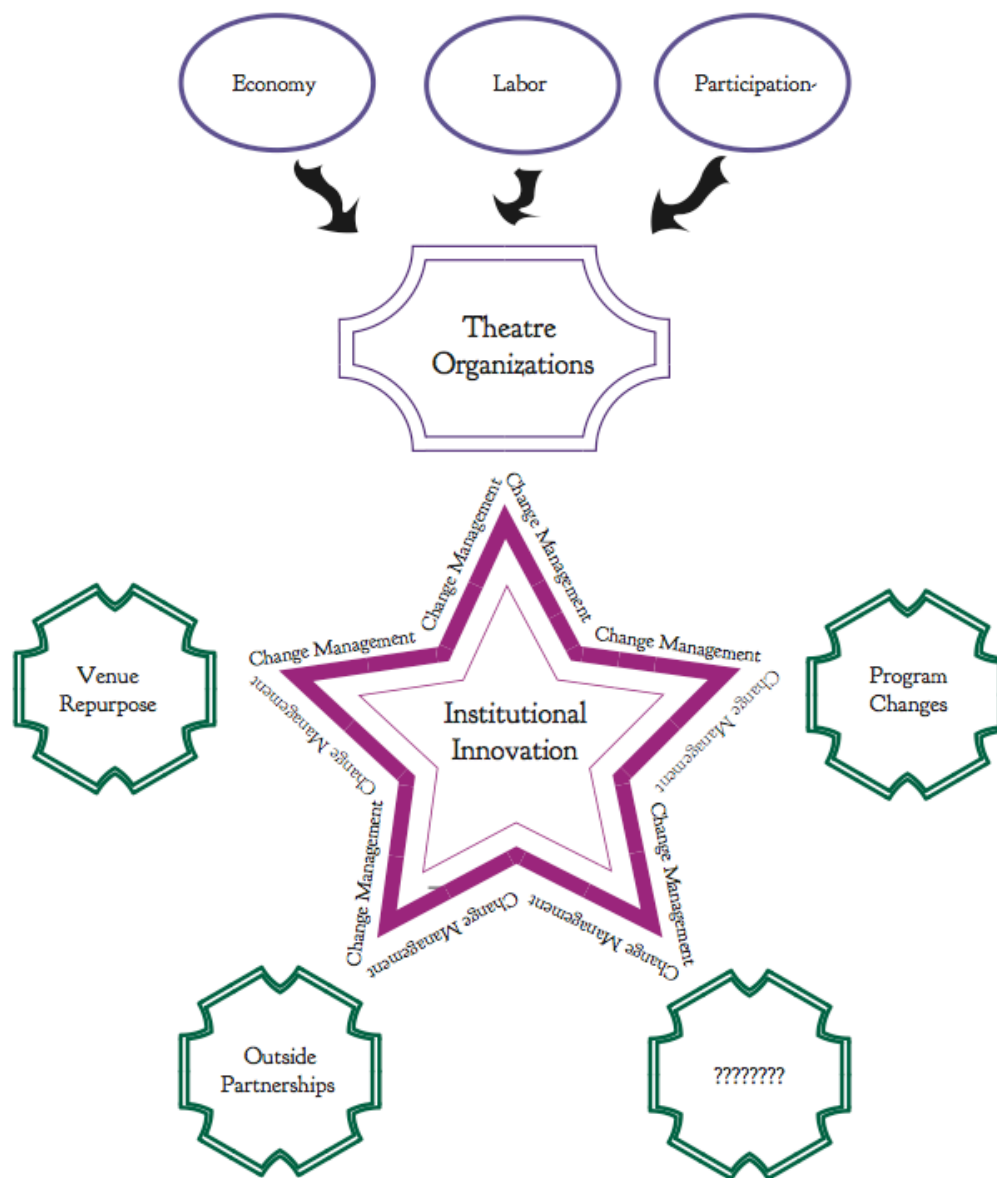
Figure 1: Conceptual Framework

1.4 Methodology and Design:

The purpose of this study is to explore how theatre organizations as complex adaptive systems react to shifting external paradigms and to investigate how organizations are implementing change based upon those reactions. This research specifically focuses on change management at a sociological level, seeking to define management strategies that encourage innovation within an organization. This research project addresses the following research question: How do theatre organizations use change management tools to implement institutional innovation?

This research is conducted using a post-positivist/social-constructivist paradigm. Zina O'Leary (2010) describes post-positivist as an approach "that can be participative, collaborative, inductive, idiographic and exploratory" (p. 4) as opposed to a positivist research design wherein a hypothesis is tested. This research claims no major hypothesis; rather it is exploratory in nature, seeking to describe management techniques used by the field. O'Leary defines social-constructivism as "theories of knowledge that emphasize that the world is constructed by human beings as they interact and engage in interpretation" (p.6).

This research is further defined by Complex Adaptive Systems Theory, based on the understanding that theatres consist of many diverse and autonomous components or parts which are interrelated, interdependent, linked through many interconnections and behave as a unified whole in learning from experience and adjusting to changes in the environment (Complex, 2010). This research employs the belief that theatre organizations are structured of semi-autonomous departments working toward and effected by the

greater whole of the organization, and as such can be viewed through the lens of Complex Adaptive Systems Theory.

Originally, this study was designed to encompass a case study and an online survey of executive level theatre management. Due to bureaucratic delays the scope of the study has been altered to focus more on organizational trends as substantiated by extant leadership. This redesigned study examined available literature in the field, including scholarly articles and books as well as media articles, press releases and reviews. These publicly available documents were further informed by my personal and professional experiences and observations. Therefore, the study was largely founded on grounded theory and continual action research.

1.5 Assumptions and Bias:

I am a theatre professional and acknowledge my bias toward the multi-disciplinary and experimental aspects of the craft. My history with organizations experiencing large levels of change, and personal desire to contribute to successful change management has served as inspiration for this project. As an emerging leader in the field, I have a personal interest in researching and creating connections with organizations that are pioneering innovation within the regional theatre system. Furthermore, I worked as an employee at one of the proposed research sites, ACT Theatre. My employment with the organization terminated in December of 2007, before the programs being studied were fully implemented. I returned to ACT Theatre as an intern in the summer of 2011. My observations during this time affected my understanding of the research at hand.

Through this research I hoped to gain an understanding of how theatre organizations are navigating through shifting paradigms. I aimed to discover how institutions that are implementing innovative strategies are creating buy-in within their organizations and provide knowledge to the field on activities that are particularly successful as well as share any pitfalls that have occurred.

1.6 Delimitations:

This research looks at the change management techniques implemented by theatre organizations as they institute innovational change within their organization. Studied organizations were selected based on the following three criteria:

1. The mission of the organization must be primarily theatre based.

2. The organization must be at least 15 years old.

3. The organization must exhibit a change in structure related to venue and programming within the past five years.

Based on the above criteria, the three organizations selected for analysis are as follow:

American Repertory Theatre in Cambridge, MA. In 2008 Diane Paulus became the new Artistic Director of American Repertory Theatre, a company in Cambridge, MA which was founded in 1980. Under Ms. Paulus' direction, the organization developed the EXPERIENCE THE A.R.T. initiative. This initiative promotes the organizations mission "to expand the boundaries of theatre" (ART mission, n.d.) by highlighting the social aspects of theatre and creating a "total theatre experience" for audience members (ART mission, n.d.). As a part of the initiative A.R.T. has opened the Oberon, a second stage

nightclub theatre. According to James Wetzel, Oberon's programming associate, Oberon is "Committed to presenting work that fits into the world of 'club theater'…not only are we helping local artists cultivate their work and talents, we also encourage them and their audiences to come to the venue, have a great time, and push the boundaries of theater" (Sweeney, 2010).

A Contemporary Theatre in Seattle, WA A Contemporary Theatre was founded in 1965. According to information provided on ACT's website Gian-Carlo Scandiuzzi joined ACT in 2007 to launch the Central Heating Lab initiative, and took over as executive director in 2008 (ACT Leadership, n.d.). The Central Heating Lab, launched in 2008, provides a venue for Act to highlight new works and talent within the genres of "theatre, cabaret, music, dance, spoken word, and performance and visual art" (ACT our work, n.d.). ACT Theatre has also introduced a monthly membership plan, wherein members pay a monthly fee for access to any Mainstage or Central Heating Lab production (ACT membership, n.d.)

Intiman Theatre in Seattle, WA In April of 2011, Intiman Theatre alerted their audiences that they were in the midst of a financial crisis, and would be closing their doors for the rest of the season. Presently, Intiman is in the process of working with consultants, their board, and members of the artistic community to rework their programming and reopen in 2012. It has been suggested that Intiman will reopen under a model that is similar to ART's Experience ART initiative and ACT's Central Heating

Lab. Intiman may prove to be an excellent example of the continued trend of institutional innovation within the field of professional theatre.

1.7 Limitations:

This research has largely been limited by the lack of available field research data. Human subjects research requires a lengthy review process that was unable to be completed within my timeline for graduation. As a result, I looked only at data that is publicly available. Without being able to interview key participants, it is difficult to get a full view of the ways in which organizations create internal change and the effect those changes have within the organization.

This information has been further limited by the organizations that I have chosen to study. Non-profit organizations are required to submit an annual W-9 tax form, but organizational transparency ends there. Of the three case study sites, only one provides public access to an annual financial report. The field as a whole tends to remain tight-lipped about internal issues. This is exacerbated in times of financial duress, when it is potentially fiscally dangerous to show donors signs of weakness.

Much of this study focuses on changes that have already happened and the resulting effects, based on publicly available documentation. However, the changes occurring at Intiman coincided with the writing of this study. Intiman continues to provide updates on their process, allowing for deeper insight into their organization. Further study of organizations that are in transition would possibly be of interest to the field and would require a longitudinal design not included in this research.

1.8 Introduction to the Study:

This research project explores how regional theatre companies are using change management to institute institutional innovation. It begins by providing an introduction to the changing economic landscape, using data compiled by Theatre Communications Group. This data provides an indication that regional theatre companies are facing a time of economic changes. Assuming that organizations choose to adapt to the changing economic climate, the following chapter provides an understanding of the current trend toward institutional innovation. By examining conference talking points, national and statewide innovation initiatives, and data from the field, it can be inferred that the field is suggesting the implementation of new initiatives as a response to these challenges. Implementation of new initiatives within organizations requires an understanding of change management. This research looks at change management through the lens of Complex Adaptive Systems theory, an offshoot of chaos theory that purports that a change in one area of an organization effects the organization as a whole. The literature review concludes with an overview of current trends in labor and participation, particularly examining the roles of the Creative Class and the Pro-Am movement within regional theatre organizations.

Once the baseline topics have been defined and discussed in the literature review, this paper will examine how three different organizations are reacting in real time. It will provide an overview of Artist's Repertory Theatre in Cambridge, MA, and A Contemporary Theatre and Intiman Theatre in Seattle, WA. Artist's Repertory Theatre and A Contemporary Theatre have both created initiatives that react to a changing climate by repurposing venue spaces and integrating a wide variety of partnerships into

their programming structures. Intiman Theatre is facing a financial crisis that has forced them to temporarily close, and are in the process of creating a new operating model that addresses the challenges faced by their venue and opportunities provided by partnering with outside organizations.

This research will conclude with analysis of how the case study organizations' actions are effecting their organizations and the field as a whole, highlighting areas for further research and suggestions for the field.

Part 2: Literature Review:

As this topic is explorative in nature and focused narrowly on professional theatre companies, the accompanying literature review was created by looking at a broad range of documents, filtering their information, and applying it to the regional theatre system. Theatre Communications Group was the exception to this rule, as the organization provides a variety of studies, white papers and reports on the current state of American Theatre. This literature review provides a frame of knowledge and definition of the field that serves to guide the research as I report on how theatre companies are reacting to changes in economics, labor and participation.

2.1 Economics:

The modern regional theatre system relies heavily upon the seasonal subscription model. Patrons are asked to take a leap of faith, trusting that the programming offered throughout the year will relate to their interests. As a reward for purchasing tickets in bulk the patrons receive a small discount off the price of the tickets. Theatres profit from having cash in the bank at the start of the season and the promise of a guaranteed audience (Newman, 1997). Furthermore, Artistic Directors, confident in their audience's trust, are able to program less popular, but artistically important works within the scope of a whole season. The concern that audiences will not come to these more esoteric productions is lessened because many had already paid for the season in advance, thereby lessening the potential for an unpopular piece causing financial burden (Newman, 1997). While the subscription model began with the Independent Theatre movement in the 1920's and 30's, it reached prevalence with the expansion of the regional theatre system in

the 1960's (Newman, 1997). In 1961 the Ford Foundation hired Danny Newman to their audience relations department. Danny Newman became the champion of the Dynamic Subscription Promotion (DSP), a system that has reigned supreme for half a century (Newman, 1997).

In 1997, when faced with voices of dissent regarding the subscription model, Newman countered, "The idea that we can have any significant body of resident theatres today without subscription is ludicrous" (Newman, 1997). While it may be ludicrous, theatres are still searching for new options almost twenty years later. Seasonal subscription income dropped 8.5% between 2005 and 2009 whereas single ticket income rose 6.2% during that time (Voss, Voss, et al, p. 1).

While regional theatre companies are seeing a shift in audience buying behaviors, the Dynamic Subscription Promotion model is in no way extinct. Theatre Communications Group, the national organization dedicated to the regional theatre field, compiles a report on the field's fiscal standing each year. According to the Theatre Communications Group subscription sales accounted for a total of 17.9% of theatre's earned income in 2009. Single ticket sales accounted for 21.5%. However, theatres do not run on ticket sales alone. In 2009 income from contributions accounted for 54% of theatres total budget. Theatres are seeing a drop in these contributions, widely believed to be an effect of the global economic downturn (Voss, Voss, et al, p. 6).

The Theatre Communications Group reports that donations from federal sources decreased from $69,025 in 2005 to $47,200 in 2006. However, in 2007 that number rose to $49,317 and $57,068 in 2008. In 2009 the number leaped to $95,128, a number skewed by a single theatre receiving $4.3 million dollars. It is unclear from the data which

organization provided such a drastic change in federal income. Were that organization to be excluded from the study "average federal funding in 2005 would have been $64,315 and $50,670 in 2009, for an overall inflation-adjusted decline of 31%" (Voss, Voss, et al, p. 12).

On the state and local levels, where contributions are traditionally two or three times higher than federal, the trend continues to decrease. States have provided 29.3% less funding between 2005 and 2009. Cities and counties have provided 23.4% less. Corporations have followed suit with a 23.8% lower rate of contribution (Voss, Voss, et al, 2010).

However, there is a shift in the landscape of contributions. Foundation support has risen by 11.8% and trustee support by 14.2%. In-kind services, materials and facilities contributions have increased by 33.4% over the four-year span (Voss, Voss, et al, 2010). Other contributions, a nebulous category without a clear definition, have risen 80%, by far the largest increase in contributed income over the past four years, indicating that the category may need to be expanded to define what other contributions are. Both in-kind contributions and other contributions provided greater than $180,000 each to the theatre economy in 2008, a number significantly larger than the $95,128 from the federal level, and $103,585 from the state level (Voss, Voss, et al, 2010). These numbers indicate a shift in organizational thinking and a trend toward innovative solutions for funding gaps.

2.2 Innovation:

In a 2010 address to the Association of Performing Arts Presenters, Kenneth Foster lays out the realities of the changing performing arts industry and implores

colleagues to consider the role of innovation:

> Along with innovation comes the need for bold thinking – not just the crazy new ideas we might generate but the systems and procedures to bring those ideas to fruition – to make innovation happen and happen continuously in order to become an adaptive arts organization, one that responds to the times and presages for the rest of the culture, what is to come. (p. 16).

Foster is not alone in this thinking. Innovation has become the rallying cry for non-profit organizations. In a 2010 study by Johns Hopkins' University's Center for Civility Studies, it was reported that 82% of surveyed NPOs implemented at least one innovative program within the past two years (Salamon, 2010). Funders and service organizations have responded to this trend toward innovation, witnessed by the Theatre Communication Group's A-ha! Think it/Do it project and EMC Arts' Innovation Lab for the Performing Arts. Support has begun to be exhibited at a state level by California's Creative Capacity Fund NextGen Arts Innovation Grant Program.

TCG along with MetLife is in its third round of grants for the *A-ha! Think it/Do it* project. Through the *Think it* arm of the grant organizations are provided with $25,000 for research and development (TCG, December 2010). The *Do it* arm of the grant provides $50,000 for designing and prototyping ideas (TCG, December 2010). This project addresses one of the major concerns with institutional innovation: money. According to Teresa Eyring, executive director of TCG, "This program allows (organizations) to strive for new ways of thinking and development and testing new models, without having to shoulder all the financial responsibility" (TCG, August 2010).

EmcArts is a non-profit service organization with a focus in providing nonprofit arts and cultural organizations service "in the design and management of innovative change, and…building adaptive capacity" (EMC, n.d.). EmcArts, with funding support from the Doris Duke Charitable Foundation, has founded the Innovation Lab for the Performing Arts, a systemized innovation incubator. The lab, now in its fourth round of funding, provides performing arts organizations with yearlong support to plan, experiment and implement innovative practices. EmcArts' structure provides for three phases: Research and focus, Project accelerator, Prototyping and evaluation (Evans, 2010).

While grant reports and assessments have yet to be released for the TCG *Aha! Think it/Do it* granting program, the Doris Duke Charitable Fund has assessed EMCArts' Innovation Lab. Assessor Dr. Elizabeth Long Lingo (2010) found that all twelve program participants would recommend the lab to their peers and that the lab "was invaluable to those organizations whose long-term strategic thinking had previously taken a back seat to fighting fires, and provided leaders positive leverage with other foundations and individuals who had yet to buy in to their innovative ideas (p. 5).

Structures of support for institutional innovation are building and gaining steam not just from individual organizations but at the state level as well. California's Creative Capacity Fund Next Gen Arts Innovation Grant Program is funded by the James Irvine Foundation and the William Flora Hewlett Foundation providing Innovation Grants of up to $10,000 for organizations to "explore new policies and innovative practices that will help sustain next generation leaders" (CCF, 2010). This program is unique in that it

highlights changing labor needs and focuses its efforts on innovations designed to support new leaders the changing leadership paradigm brought about by a rise in Creative Class workers.

2.3 Change Management and Complex Adaptive Systems Theory:

According to Jeff Hiatt and Tim Creasey (n.d.), change management is "the process, tools and techniques to manage the people-side of business change to achieve the required business outcome, and to realize that business change effectively within the social infrastructure of the workplace" (Hiatt & Creasey, n.d.). Hiatt and Creasey highlight the importance of effective use of change management systems within the modern workplace, particularly in light of the needs of the Creative Class who seek ownership, pride and the power to make decisions about their work (Hiatt & Creasey, n.d.). As theatre organizations critically examine their organizational structure and begin to work toward creating new initiatives, change management practices can help to ensure smooth transition periods. Smoother transitions are more efficient, resulting in less employee pushback and more buy-in, something that is particularly important when creating a team of innovative thinkers.

When embarking on a period of organizational change, one must first define the nature of the organization. Gordon Armstrong (1997) suggests that theatres can be seen through the complex adaptive system theory, an outgrowth of chaos theory. Complex adaptive systems are defined as an "entity consisting of many diverse and autonomous components or parts (called agents) which are interrelated, interdependent, linked through many (dense) interconnections, and behave as a unified whole in learning from

experience and in adjusting (not just reacting) to changes in the environment" (Complex, 2010). Theatre organizations are systems composed of many departments. These departments work together to create one main product, the performance. In the process of working together, each department shifts and adjusts to environmental changes.

Within an organization CAS theory agents refer to individuals, within a cultural system, a *meme* (Dooly, 1997). A theatre organization can be considered both an organizational system and a cultural system, therefore being both agent and *meme*. The agents within the system create schema, or action rules, based upon their desire to maximize and evolve. Schema is created using building blocks of several smaller schema (Dooly, 1997). For example, schema has been created within theatre organizations in order to communicate design changes made within the rehearsal space to outside departments. The main schema 'rehearsal notes are emailed nightly', would be created by smaller schema 'set designer needs to know how table is used', or 'marketing needs to warn audience of gunshot'.

Given the intricate system of departments exhibited within theatre organizations, their function as autonomous parts working toward and dependant on the whole of the greater organization, I believe, based on my time working in the theatre field, that CAS theory applies to these organizations. For example, when the director and designer of a production agree on a color scheme, that decision directly affects not only the costume, lights, and scenic artists in the production department, but can expand out to the aesthetic choices made by the marketing department as well. The choice of aesthetic can continue its influence to the critic's reaction and interpretation of the production, which carries out into the community and may ultimately influence the audience of the piece. The reaction

of the audience is accounted for in future programming choices, and the organization learns and adapts from that experience.

Dooly (2007) suggests that changes in organizational schema can be quantified in three manners: first-order change where organizations better their existent product, second-order change wherein organizations alter their product or third-order change where a schema either adapts or dies due to the death of the system supporting it (p. 85). Expanding on the example of the rehearsal note schema, the director may inform the set designer that a large male actor will be dancing on the table. The designer may chose to strengthen the table (first-order change), by making it strong enough for the actor to dance on, redesign the item to be a strong chest rather than a box (second-order change), or the communication schema between designer and director may break down, resulting in the designer dramatically removing themselves from the production (third-order change).

When applying CAS theory to organizational change the literature suggests that the combination of counteracting forces of stability: planning, structure and control, and forces of disorder: innovation, initiative and experimentation, couple to create a chaotic organization (Thietart & Forgues, 1995) Thietart and Forgues believe that the result of these tensions provide learning stimulus to an organization, encouraging experimentation, innovation and new courses of action (p. 22). Kevin Dooly (2002) summarizes Thietart and Forgues' propositions on organizational chaos as follows:

1. Organizations are potentially chaotic.

2. Organizations move from one dynamic state to the other through a discrete

bifurcation process (second-order change)

3. Forecasting is impossible, especially at a global scale and in the long term (unpredictability).

4. When in a chaotic state, similar structure patterns are found at organizational, unit, group and individual levels (fractal nature of chaotic attractors).

5. Similar actions taken by organizations in a chaotic state will never lead to the same result. (p. 22)

Thietart and Forgues (1995) continue to clarify that systems entirely composed of chaos are not an ideal situation, equating such circumstances to "a maelstrom in perpetual change and revolution" (p. 23). In order to counteract the effects of organizational chaos, Thietart and Forgues recommend managers use planning to create islands of certainty, providing information networks, and encourage communication throughout the organization (p. 24). These islands of certainty are beneficial to the organization's employees, as well as volunteers and patrons. They provide a level of stability promotes connection within organizations during times of change. This can be achieved by remaining devoted to programming or partnerships that have proven beneficial to the organization and publicly recognizing their positive impacts. If an organization is working under a productive mission statement, the mission can be used as an island, creating systems of communication that remind the community that the organization is continuing to run on the same principals, but with some changes in its actions.

There are a variety of change management systems being introduced to the field. In 2010, I attended a leadership-training seminar offered by TCG and led by the Center for Creative Leadership (CCL). By hiring the CCL to lead this workshop, it is assumed

that TCG endorses the CCL's methods for use in the professional theatre field. One day of the two day intensive workshop was dedicated to change management, exploring how theatre organizations could best use the systems created by the CCL. The CCL echoed Thietart and Forgues' theories of dichotomous forces in relationships between stability and disorder, and their effects upon change. The CCL's change management system responds the following aspects of change: Vision, Skills, Incentives, Resources, Action Plans and their foils which may be perceived to hinder action: Confusion, Anxiety, Gradual Change, Frustration and False Starts (CCL, 2010).

The CCL highlights the importance of agents within organizations and suggests using the Change Style Indicator (CSI) to highlight individual styles when faced with changes. According to the Center for Creative Leadership, the CSI is "a continuum-based model divided into three styles: Conserver, Pragmatist, Originator…[measuring] individual style in approaching change and situations involving change" (CCL, 2010). The CSI places the agent along a spectrum, allowing the agent to better understand its own motivations and relate to the motivations of others. This system provides a level of empathy for agents who are attempting to implement changes within an organizational schema.

EmcArts' Innovation Lab provides for a stabilized timeline approach to organizational change, wherein a team creates a contained environment of chaos, thus providing for both the changes that can result from chaos and the structured islands needed to sustain the organization. The first four months of the process are devoted to research and focus, wherein a team of agents is selected, data is researched and schema are developed and discarded. Phase two follows as a one-week intensive workshop

wherein decisions are made, momentum built and agents prepare for schema to enter the organization. The final four to six months are devoted to prototyping and evaluating the schema within the organization, enrolling other agents, evaluating and refining (Evans, 2010).

These change management systems can be utilized by theatre organizations that are undergoing changes due to shifts in funding, labor needs, and participant bases. By acknowledging that organizations are Complex Adaptive Systems, agents of change understand that a shift in one department results in a shift in all departments. The Center for Creative Leadership recommends that change agents are cognizant of the different ways that individuals react to shifts in structure. Islands of certainty, and prototypes can be effective mechanism for managing change within an organization while remaining empathetic to varied reactions to change.

2.4 Participation and Labor:

In order to understand the environmental shifts that performing arts organizations are facing, we must first look at factors that have contributed to the status quo. In his article "Leverage Lost: Evolution in the Nonprofit Arts Ecosystem", John Kreidler (2000) outlines the rise of the nonprofit arts system in the 1960's as based largely on support from the Ford Foundation. Where previous arts models had been largely for-profit individual proprietorships, the start of the Ford Foundation's major arts initiatives in the 1950's signified a major shift toward non-profit organizational structure (Kreidler, 2000; Ivey, 2008).

Kreidler asserts that this Ford Era Labor theory, prominent between 1950 and 1990, was largely driven by an unprecedented young labor force, willing to work for discounted wages (Kreidler, 2000). High numbers of Baby Boomers entered the artistic work force, with a bohemian ethic and little concern for large financial payoff. Kreidler quotes Richard Harvey Brown of the University of Maryland's Survey Research Center as saying "governmental data on various artists occupations for 1970 and 1980 revealed that the number of art workers had increased by 48 percent, whereas their earnings during this period had decreased by 37 percent" (p. 155). These young Baby Boomers were driven by shifting societal values, a strong economy, a rise in liberal arts education and high levels of leisure time. By living in shared housing and embracing a bohemian lifestyle, artists were able to provide unprecedented levels of discounted labor in exchange for a feeling of satisfaction and pride in one's work.

Unfortunately, the Ford-era labor trends were not particularly sustainable for the non-profit sector. Eventually the priorities of the young excited labor force shifted. As the Baby Boomers began to age, they began to migrate toward secure positions, either within large cultural institutions or outside the nonprofit sphere entirely. Those who remain within the nonprofit realm are continue to be paid less than their for-profit counterparts - $6,000 dollars less on average (NEA, 2008).

In contrast, the new generation is largely made up of individuals who were brought up in post-culture wars America, where artists are required to constantly remind their communities about the validity of their work. Arts education has taken an enormous cut, and cuts in education result in a decline in artistic literacy. Societal values are taking a conservative swing away from the arts, a factor that is being fed by a poor economy and

a marked decrease in leisure time. Real estate, while not as expensive as it was during the housing bubble, remains out of the financial range of many artists. Studies are conflicted regarding increases or decreases in leisure time, but it has been theorized that leisure time has simply become more fragmented, resulting in shorter durations of time to devote to leisure activities (McCarthy & Jinnet, 2007, p. 26). Economic recessions in the 1990's began a shift in donor trends at a private and corporate level (McCarthy, Brooks, Lowell & Zakaras, 2000, p. 15), causing non-profits to grapple for new modes of support. In fact, we have effectively seen a reversal in all of the major societal trends that allowed for Ford-era labor practices in the arts (Kreidler, 2000).

These shifts have resulted in some major issues for arts organizations. Without financial support or the ability for inexpensive living and venue space, it can be difficult for artists to break into the field. Creative minds are being brought into the corporate world, where employment security means fiscal solvency. Individuals who do chose to enter the field of non-profit performing arts are asking for more money than their predecessors, wreaking havoc on organizational budgets. If organizations wish to bring in these new employees they must somehow find the funds to do so. The task of creating worthwhile artistic ventures in the face of this myriad of forces can place enormous pressure on human capital, resulting in burnout and high turnover rates, neither of which provide organizations with stability or sustainability. These shifts in social and economic trends must be addressed in order for our organizations to thrive.

In his 2002 book, *The Rise of the Creative Class*, Richard Florida seeks to identify individuals at the core of these shifts. Florida's "Creative Class" is not a generational trend *per se*, though it is often used in tandem with descriptions Generations X, Y and Z,

or all post Baby Boomer generations born after 1965. The Creative Class is a socioeconomic class, which Florida explains as:

> ...all members of the Creative Class-- whether they are artists or engineers, musicians or computer scientists, writers or entrepreneurs-- share a common creative ethos that values creativity, individuality, difference and merit. For the members of the Creative Class, every aspect and every manifestation of creativity-- technological, cultural and economic-- is interlinked and inseparable (p.8).

Florida segments the Creative Class into two components: the "Super-Creative Core" and "Creative Professionals" (p. 69). Florida's Super-Creative Core consists of highly innovative workers who are "producing new forms or designs that are readily transferable and widely useful" (Florida, 2002, p. 69). Florida uses actors, entertainers, and designers to exemplify positions in the Super-Creative Core. Essentially, these thinkers are employed to critically engage, innovate, and create new content. They are not only encouraged to think beyond the box, but for the Super-Creative Core the box may be a sphere or a star or there may even be no box at all. This is in stark contrast to the Ford-era workers, who remain strictly within the box and whose purpose is generally that of a cog in an organization's wheel.

Creative Professionals, Florida's second segment, are also encouraged to utilize their creative mind, though they are encouraged to create innovative solutions within readily defined parameters. Creative Professionals have a box, but are encouraged to push

its boundaries. Florida uses physicians, lawyers and managers as examples of Creative Professionals (Florida, 2002). Within the non-profit theatre field, technicians would be an excellent example. Often called upon to think creatively, theatre technicians can create new systems and innovative solutions on the fly, but their primary function is to follow design schematics and create within parameters set by others.

Organizations looking to recruit members of the Creative Class should be aware of some general preferences that the class has regarding employment. Theatre organizations may be able to compensate for low salaries by providing at atmosphere that is appealing to the Creative Class. There are simple tenets, such as loose dress code, flexible work hours, and aesthetically appealing workspaces (Florida, 2002) that serve as incentives for current and future employees. In many ways, these preferences are in direct opposition to Ford-era labor practices of strict dress codes, time clocks and cubicle farms wherein each worker is a part of a mechanized whole or a corporate hive mind.

The Creative Class has gained leverage in a society where humans are being replaced by robotics. The individual mind, its ability to create and innovate, has set these workers apart and in many ways is the strongest asset they have. As a result, the Creative Class thrives when given autonomy in their work. They have confidence in their ability to use their creativity as a tool and while they seek to be guided and mentored, micro-management is a poor management technique. The typical top-down information flow is insufficient for operations with a high level of Creative Class workers. According to Florida, Creative Class workers are more comfortable in an open studio sort of environment, where hierarchical walls are literally torn down, resulting in expanded possibilities for communication and discussion and, by extension, innovation (p. 127).

The field of the performing arts would be well served by recognizing the value in Florida's observations as they relate to current labor trends. The typical theatre company already contains some key aspects that appeal to the Creative Class, particularly in the realm of collaboration. Collaboration is essential to the process of creating a production, though it is traditionally seen within the production and artistic departments. Often other departments, such as marketing and development, work alongside the more traditionally creative teams only during weekly staff meetings. The hierarchical structure inherent in theatre organizations segments the various departments in such a way that each department creates programming (productions, marketing, special events, etc.) with minimal input of outside departments. The studio environment that Florida describes, would allow for more ambient communication within departments, maximizing on the strengths of the new generation of employees and inherently creating a more collaborative environment. The resulting product has the strong potential of creating a nature of innovation throughout the organization as well as a more cohesive organizational message.

Florida's profile of the Creative Class expands beyond issues of organizational culture and employment and provides a thorough description of the leisure time needs of the demographic. Described as, "a quest for experiences that are in themselves rich and multi-dimensional" (Florida, 2002, p. 162), the Creative Class lifestyle seeks to pack full experiences into very little time. As a result they cluster in regions that provide the most bang for their buck.

The most dynamic cultural leisure-time experiences for the Creative Class appear at street level, where music, food, art and socializing intersect (Florida, 2002). This

neighborhood aesthetic differs from a designated cultural district. Cultural districts are mandated areas, consisting of elite institutions. Attending events at these institutions requires purchasing tickets in advance, and often consists of one major experience with a limited number people. When an individual attends an evening of theatre it is generally with one or two others. The group may have dinner or drinks before hand, and then watch a performance for two to three hours. The entire evening may last for four hours, and consists of a limited variety of experiences. In contrast neighborhoods with a thriving street scene may offer boutique shopping, musicians or performance artists on the street, gourmet coffee shops and lounges selling micro-brews and locally sourced foods. Each venue doubles as a visual art gallery, and often there is more visual art to be found on the street as well. At the street level, the same four-hour duration can be filled with a multitude of experiences, thus creating a more satisfactory experience for the participants.

This is a difficult position for theatres to be in. The current social contract requires individuals to enter a theatre and sit quietly in the dark for an extended period of time. This is in direct opposition to Florida's description of the Creative Class's preferences. As a response, we see theatre organizations working to create a street scene within their venues.

Portland Center Stage (PCS) provides an excellent example of this trend. Their newly built Gerding Theatre at the Armory contains a 600 seat main stage, a 200 seat black box, shops and offices, a cafe, gallery and open lobby space. The cafe and gallery serve as a meeting place not only for the resident community of artists, but also draws in the public from the busy Pearl District. In addition, PCS offers a variety of experiences to

the public, including yoga classes, performance art, lectures, live music and multi-media installations (PCS, n.d.). By utilizing their venue in innovative ways, PCS seeks to create multi-dimensional experiences that will resonate with members of the Creative Class.

In a different trend, some performing arts organizations are taking directly to the streets with their performances. Lucia Neare's Theatrical Wonders is a community performance art project commissioned by the City of Seattle's 4 Culture program. Over the course of a year, once a month on the new moon, Lucia Neare brought a menagerie of nocturnal apparitions to perform in Seattle's neighborhoods and parks. This event, titled Lullabye Moon, married sound, dance and spectacular costumes into the architecture, parks and open spaces of neighborhoods. While lead by a professional artist, Lullabye Moon's performers were not professional performers themselves. Rather, they were Creative Class workers from a broad range of industries, who dedicated their leisure time to creating a high quality performance for their community.

These volunteers can be regarded as Pro-Ams, or professional amateurs. Over the past two decades the Pro-Am movement has been quietly stirring. Pro-Ams can be thought of as exceptional hobbyists, though hobby is a difficult word to use to describe the activities of a Pro-Am, as it has the potential to marginalize the importance of the work. Their passion for a subject, outside of their professional career, leads them seek high level connections with their subject. Pro-Ams will take classes, invest in expensive pro-level equipment, and devote much of their leisure time in pursuit of their hobby. The resulting product, particularly when Pro-Ams network together, has had a distinct impact on the culture of our communities.

In their 2004 publication "The Pro-Am Revolution: How enthusiasts are changing our economy and society" Charles Leadbeater and Paul Miller explain "The twentieth century was shaped by large hierarchical organizations with professionals at the top. Pro-Ams are creating new, distributed organizational models that will be innovative, adaptive and low-cost" (p. 12). As high level training gained steam with the Baby Boomer generation, there became a marked delineation between the professional and the amateur. Amateur was seen as a derisive term for one who is not good enough or has not put in enough resources to warrant the title of a professional. Today's Pro-Ams are breaking down the hierarchical barriers between the professional and the amateur. Leadbeater and Miller propose the following new continuum of activity. As you move along the continuum the amount of time, money and knowledge put into a subject rises. Leadbeater and Miller place the Pro-Am between the third and fourth levels on this continuum.
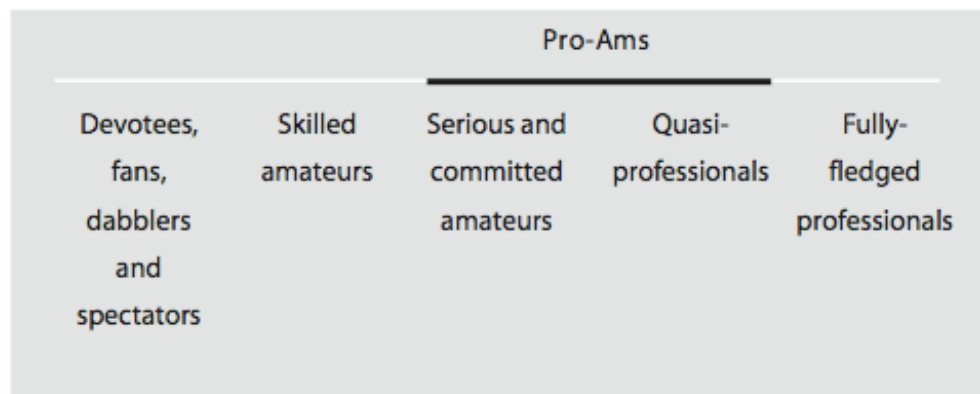

Figure 2: Pro-Am Continuum (Leadbeater & Miller, 2004, p. 23)

Communication is a major aspect of the Pro-Am lifestyle. As a rising community, there were no built-in organizational structures for the Pro-Am to use. Professionals have institutions, unions, and professional organizations but the Pro-Am has had to build those networks from scratch. Technology and digital media have played a large role in creating

networking between individuals. Pro-Ams connect online, via chat rooms, websites and email. According to Allison McGuire, a Pro-Am actor in the UK,

> Organization has become a lot easier with email. We have to organize ourselves while also doing our day jobs but cannot be on the phone the whole time talking about theatre. Email allows us to combine our work with organizing these activities outside work. It has helped us enormously.
>
> (Leadbeater & Miller, 2004, p. 48)

Within the performing arts you often see Pro-Ams as writers, designers, actors and directors. As the divide between large theatres and small theatres grow, smaller organizations increasingly depend on Pro-Am level talent. These individuals have similar skill levels, but can be paid a small stipend for their work. As it is understood that they have day jobs, they are not required to put in the same amount of time as their higher paid professional counterparts may be.

During a panel at the 2010 Theatre Communications Group Conference, entitled "Theatres becoming Centers in the 21st Century", the Arena Stage's Artistic Director Molly Smith asked the audience for an extended conversation on the roll of the Pro-Am in American Theatre. Nobody spoke up in response during that session, a sign that the field is either unaware of the movement, or like Ms. Smith, is unsure how best to react to it. However, I believe that theatres, especially small theatres, have always had space for the Pro-Am. It is the larger institutions, with their traditionally elite systems, and strict union regulations that must actively work to integrate the population.

Lord Leebrick Theatre Company in Eugene Oregon provides an example of how the Pro-Am has been integrated into the small professional theatre. At the administrative

level Lord Leebrick is run by professional administrators and supported by volunteers who are not paid, but provide a professional level of support. In particular, one volunteer has been working at the office five to ten hours a week for more than four years. At the production and artistic level Lord Leebrick recruits talent from the local university and from the greater community. Actors and designers largely hold day jobs or are in school and are paid a small stipend for their work, which is expected to be of high caliber. In addition, Lord Leebrick holds a series of classes for the adult learner who is interested in expanding their level of connection and skill in the theatre. These classes not only provide the individual with education and a connection to the institution, but they also provide an opportunity for learners to network together.

This becomes trickier at large institutions, where union requirements dictate many hiring practices and traditional hierarchical barriers may be difficult to cross. As organizations open their doors to the community, much in the way that Portland Center Stage has, the barriers of participation are reduced. A Contemporary Theatre in Seattle, WA has been exploring an expanded model of participation within their institution by restructuring the purposes of their venue and creating spaces for non-traditional performance and art. The project, called The Central Heating Lab, provides a venue for new and emerging talents to perform their works in an experimental setting (ACT, n.d.). By creating a space for these performances, ACT Theatre has begun to bring in and validate the work of the Pro-Am artist.

It must be recognized that the Pro-Am does differ from a professional. Leadbeater and Miller (2004) explain, "there are limits to what Pro-Ams can achieve" (p. 15). While they provide a great deal dedication to the field, they are not necessarily experts, nor do

they want to be. Pro-Ams have day jobs they are responsible for. Rather, they enjoy the freedom of choice that comes with being a Pro-Am.

As the Baby Boomers reach retirement age, there is research to suggest that many will seek engagement with organizations on a volunteer basis (Halpern, 2006). As the Boomers leave traditional employment sectors they may seek to integrate their professional level skills into creative fields, resulting in a wealth of knowledge that could potentially be integrated into theatre organizations. In exchange, retirees receive social benefits as well as recognition for their work. The above quoted Pro-Am actor Allison McGuire is one example of an individual who expects to expand her Pro-Am activities after retirement. Leadbeater and Miller (2004) explain that when Pro-Ams were interviewed, many sought "to come back to a 'parallel' or 'shadow' career later in life (p. 50). Organizations would be well served by creating structures of management to bring these Pro-Ams into their organizations.

The Pro-Am revolution has great potential to provide new levels of participation within theatre organizations. While institutions strive to reach out and connect with their community the Pro-Ams are hungry to participate. By tearing down the hierarchical walls of elite institutions and becoming centers for their communities, theatre organizations may be able to organize an outstanding amount of cultural capital.

The main point of intersection between the Creative Class and the Pro-Ams exists within their dual needs for active participation. According to the 2008 NEA report "Beyond Attendance", 74% of surveyed adults reported participating in the arts within the 1-3 months preceding the survey. The survey segments participation into the following three categories: Attendance, Creation and Media-Based participation. Of those

surveyed adults, 26% report artistic engagement in all three categories (Novak-Leonard, Brown, & WolfBrown, 2008, p. 16). Within respondents who identified as theatre participants 53.5% only attended live events, 22.1% participated through recordings and broadcasts and 19.8% both attended live events and engaged with recordings and broadcasts. Only 4.6% of respondents reported participation through creation, a result significantly lower than in music, dance or visual arts and only 1.3% indicated participation across all three defined categories (Novak-Leonard, et al, 2008, p. 17). This data indicates potential room for growth in active participation within theatre organizations.

Creating experiential models of participation will allow theatre organizations to relate to the multi-dimensional needs of the Creative Class and to the participatory needs of the Pro-Ams. Maslow's Hierarchy of Human Needs can be used as a source to motivate both groups' participation by creating programming which directly addresses basic human needs (Kotler & Sheff, 1997, p. 77).

At the basic level, humans have physiological needs that need to be met. Providing theatrical experiences near cafes or integrating expanded food and drink options into an existing venue can address this need, as well as add a dimension to the experience of a night at the theatre. Safety needs are the next level of human need. Physical safety needs to be ensured, of course. But just as important is emotional safety. People need to feel comfortable expressing themselves, a trend that ties back to the needs of the Creative Class worker. This need for safety extends through to social needs and esteem needs. By creating an environment where participants can engage and feel a sense of belonging to the work, organizations are meeting the social needs of its community

and are strengthening their connections. Recognizing an individual's achievements enhances esteem and creates another tie to the organization. For Pro-Ams this recognition may provide an essential validity to the strength of their work. By providing gratification to each of the individuals needs, we reach the top tier of self-actualization wherein the individual experiences, among other things, "greatly increased creativity" (Kotler & Sheff, 1997, p. 84), which should be a goal of every performing arts institution.

Through both the Creative Class and the Pro-Ams we see a trending democratization of culture. No longer is knowledge solely held by a select few within the confines of an ivory tower, rather it is being spread out to individuals who are hungry for dynamic and active participatory models. As Bill Ivey and Steven Tepper say, we are becoming cultural omnivores (p. 6). In trying to reach out to the Creative Class and the Pro-Ams, institutions which are traditionally considered High Art are being asked to come down to street level and create experiences that relate to a wider variety of needs. As Ben Cameron states in his TED Talk "The true power of the performing arts", "Ultimately, we now live in a world defined, not by consumption, but by participation" (Cameron, 2010). As organizations seek to create innovative solutions to the troubles they are facing, they have an immense amount of potential capital in reserve with both the Creative Class and the Pro-Ams. Based upon my research, multi-dimensional, active programming is the key to unlocking those reserves.

Part 3: Case Studies:

In order to gain insight on innovative activities of regional theatre organizations, I have researched initiatives presented by The American Repertory Theatre (ART), A Contemporary Theatre (ACT) and Intiman Theatre. ART and ACT have both taken underused spaces within their organizations, turned them around and created exciting new opportunities for partnership and collaboration. Rather than allow these spaces to suck resources from the organization, their redesign provides their theatres with an income stream, audience outreach, and creative development. Intiman Theatre, on the other hand, has temporarily closed its doors as it wrestles with a massive leased theatre space, and crippling debt. While Intiman's future remains unclear at the time of this writing, they have indicated that they are looking toward models that are similar to ACT and ART, and re-imagining their venue as a cultural hub for theatre artists.

3.1 American Repertory Theatre

The American Repertory Theatre (ART) in Cambridge, MA was founded in 1980. In addition to creating a seasonal repertory, ART serves as the resident theatre for Harvard University, founding the Institute for Advanced Theatre Training at Harvard University in 1987. The theatre largely produces new plays and contemporary works, as well as re-imagined classics. While the exact mission of the organization is not readily available, a snippet from their website provides ART's mission is "to expand the boundaries of theater" (ART mission, n.d.).

Diane Paulus joined ART as Artistic Director in 2009. The director, who often delves into the realm of the avant-garde and who the New York Times describe as a

"Club Kid" (McGee, 2008), immediately created the new initiative, Experience ART. According to a 2009 American Theatre article on the future of American Theatre, Experience ART "seeks to revolutionize the theatre experience through a sustained commitment to empowering the audience" (Paulus, 2009). Paulus (2009) indicates that the trend of lowered audience retention and a lack of new audience members is not the fault of shorter attention spans or a loss of culture. Rather, she looks at how institutions are responding, claiming that it is the failure of producers to create engaging activities for the audience. Thus, the Experience ART initiative was developed to create a "total arts experience" (Paulus, 2009) for the audience.

The first production under the ART initiative was a retelling of Shakespeare's Midsummer Night's Dream, set in a 1970's disco. The Donkey Show was originally created by Paulus in 1999, ran in New York until 2008 and included tours to London, Spain and South Korea (Tench, 2009). The Cambridge production took an underused performance space and re-imagined it as Club Oberon, a nightclub performance space that sought to fulfill Paulus' mission of bringing the experience to the audience. Tom Fish, who played the role of Moth, provides this description of how the production crossed over the fourth wall, and immersed the audience in the experience:

On the street outside the theatre, a red rope was setup outside the entrance and a doorman checked off audience members on his guest list. Meanwhile, Oberon greeted the patrons in line, welcoming them to his club. His "Puck" sidekick, the roller skating Dr. Wheelgood, toyed with the audience playfully while the Vinnies, a goofy tag team of womanizers from Queens, flirted with ladies in the crowd. Inside the club, the fairies energized the partygoers like a group of

enthusiastic Go-Go boys. We would lead them in a disco line dance, rub glitter onto martini-holding bachelorette parties, or feed cherries to onlookers while sitting on the bar. (Tench, 2009).

The performance was successful, and its run has continued to be extended. As of December 5, 2011 The Donkey Show performs twice a week.

The Donkey Show was just an introduction to Club Oberon. It has since been fully adopted as a second stage venue, serving a wide variety of artists and audiences. In October of 2011, Club Oberon presented a queer comedy show, marching bands, burlesque, traditional vaudeville, opera, *The Rocky Horror Show*, belly dancing, one act plays, rock music, and more.

ART's annual reports are not available online, so it is difficult to quantify exactly what the audience development rates are, or how Club Oberon has effected the organization's overall financials. That said, we can speculate that it is financially successful based on a continued run of *The Donkey Show*. Likewise, the number and diversity of outside projects that ART is presenting in Club Oberon, would suggest that a wide audience base is being exposed to the Club, and by connection, to ART.

3.2 A Contemporary Theatre

A Contemporary Theatre (ACT) in Seattle, WA is also working on an initiative that brings outside organizations into their spaces. ACT Theatre is housed in Kreielsheimer Place in downtown Seattle. The building contains two large performance spaces, seating 434 people and 409 people. In addition, they have a flexible cabaret space that can hold up to 200 people. The theatre produces an average of six mainstage

productions each year, with little to no mainstage overlap. As a result, ACT was working significantly under its seating capacity, maintaining a variety of spaces while only earning income from one at a time.

As is the case with many non-profit theatre companies, ACT's financial stability has not always been secure. In 2003 ACT Theatre was in dire financial straights. The theatre had been running with significant losses for several years and according to Sheena Aebig, co-board president, the theatre let its "artistic eyes outrun (the) financial pocketbook. We were not keeping a close enough eye on things" (McKinley, 2003). The theatre company went on a six-month hiatus before resuming operations at a scaled back level. The theatre has since restructured some programming, and continues to develop new initiatives in programming and artist development.

When Gian-Carlo Scandiuzzi joined ACT in 2008 as Director of New Works, he and Artistic Director Kurt Beattie created The Central Heating Lab as a venue to highlight new works and talent within the genres of "theatre, cabaret, music, dance, spoken word, and performance and visual art" (ACT our work, n.d.), an initiative that served to fill ACT underused resources. Largely presented in ACT's cabaret space, the first CHL season consisted primarily of companion pieces that tied in directly to mainstage performances. In 2009 Scandiuzzi was named Executive Director of ACT, and with that the CHL programming began to include more outside artists, with less connections to the mainstage programming. In 2009 CHL presented eleven productions, four of which were companion pieces. In comparison, in 2008 CHL presented six productions, only one of which was unrelated to the mainstage. In 2011 CHL has produced twenty-seven events, many of them running on a monthly or quarterly basis

(ACT production history, n.d.). In the summer of 2011, ACT renovated an underused rehearsal room, creating a 49 seat experimental performance space to largely be used for CHL's extended programming.

In order to supplement the new programming being offered by CHL, ACT created the ACTPass subscription option. ACTPass allows individual to pay a monthly fee for unlimited access to most of the theatre's events. In combination with increased media outreach and social networking, and the flexibility of the ACTPass, the CHL is designed as an access point for younger audience development.

According to an independent audit of the theatre's financials in 2010, the Central Heating Lab and its partner ACTPass are key assets in the organization's plan for furthered financial stability (Moss Adams, 2011). Between 2009 and 2010, ACTPass memberships grew at a rate of 617% (2011). CHL audiences grew by 90%. Both initiatives have shown promise and management will continue to allocate funds to their development (Moss Adams, 2011).

3.3 Intiman Theatre

Intiman Theatre in Seattle, WA, is presently undergoing financial troubles that mirror those of ACT in 2003. In April of 2011, facing a daily cash crisis and over $2.3 million dollars in debt, Intiman canceled its season and went on hiatus (Taylor, 2011). According to Susan Trapnell of Arts Consulting Group, who Intiman hired to lead the rebuilding process, "The theatre does good work. This isn't a problem with bad work. But they clearly sacrificed sustainability for excellence. These things always happen with the best of intentions" (Kiley, 2011). Coincidentally, Trapnell served as managing

director of ACT Theatre in the early years, and was asked by the board to return in 2003 to help pull the organization out of crisis.

Intiman's future plans are unclear. They have continued to lease their performance space in Seattle Center, and smaller organizations like Seattle Shakespeare Theatre have been invited to use their stages during the hiatus. They have hired on Andrew Russell as the new Consulting Artistic Director. On November 14, 2011 Intiman released a plan for a four show repertory season to be held in the summer. As Russell had previously indicated, the future of Intiman will entail, "a loose collective of playwrights, directors, actors, designers and other to devise projects for Intiman to produce, in a short 'micro-season' mounted in the summer" (Berson, 2011). The new collective consists of roughly twenty artists, including Seattle Symphony's music director Ludovic Morlot, local theatre group Queer Teen Ensemble Theatre, the band "Awesome", head of Cornish University's theatre department Richard E.T. White, head of the contemporary dance group Whim W'him Olivier Wevers (Intiman, 2011). At this time it is assumed that Intiman will continue to share their space with outside organizations as well.

In order for Intiman to produce this season, they are asking for their community to donate $1,000,000 by February, money that will be used for funding the season's production costs in advance. The funds will be held as pledges until either the full amount is raised and the donations are applied, or the February end date is reached without full support at which point all pledged funds are returned and the theatre will close its doors for good (Intiman, 2011). This all or nothing financial move may relieve concerns that donors have about donating money to a faltering organization.

While ART and ACT have kept their outside partnerships at a distance, creating initiatives that are a spin on traditional second stage practices, Intiman seems to be creating an entirely innovative mode of programming for a large institution. Rather than presenting and mentoring artists in an incubation model, Intiman is creating a collective of community partners who will create the mainstage productions at its theatre. The wide range of partnerships with community organizations will serve to feed Intiman's core values, while working directly with artists who are not necessarily career level theatre practitioners.

Through these three examples we can begin to see a trend in innovational development within theatre organizations. ART and ACT have both highlighted the importance of audience development, specifically focusing on a younger audience, and have created initiatives that reach these audiences while partnering with outside artists. Intiman theatre is in a position where they must create an innovative organizational structure alongside innovative programming if they are to continue to exist as an organization. At this juncture, their model seems to be focused similarly to that of ART and ACT in that they are at creating partnerships with outside organizations, but they are taking the next step into truly bringing organizations into their mainstage seasons in order to sustain the future of the organization.

3.4 Case Study Analysis:

When examining the activities of ART, ACT and Intiman Theatre, it becomes obvious that organizations are looking at creating new initiatives in order to address the changing landscapes of labor, participation and economics. ACT and ART were fortunate

enough to create new models before the situation became critical. Intiman Theatre is looking at the work of other organizations to create a model that will help mitigate their current crisis.

Both ART and ACT have transformed underused spaces within their organizations, creating spaces that appeal to a changing demographic of theatre enthusiasts who require a multi-dimensional, participatory environment. ART's successful Club Oberon embraces the social aspect of bar culture to integrate new audiences, creating a venue that is culturally accessible to those of legal drinking age, while creating theatre with a rock and roll flair that will attract audiences accustomed to raucous performance events. By maintaining a full calendar with a variety of performance styles, ART is tapping into the diverse nature of bar culture, and creating a comfortable environment for those looking for a more socially immersive theatrical experience.

ACT's Central Heating Lab offers alcohol to its patrons as well, but is envisioned as more of a cabaret than dance club. While it must be noted that CHL is a building-wide initiative that produces works in a variety of spaces, performances are traditionally held in the Bullitt Cabaret. CHL provides opportunities for local artists to perform their works within the incubator arm of ACT. In the case of both ART and CHL, many of the organizations are made up of Pro-Am theatre practitioners, who are benefited by the support and recognition gained by working within the professional theatre organization. This validation not only creates stronger creative partnerships between the artistic community and the organization, but it also serves to enhance the reputation of the organization as a venue for new works.

Each of these partnerships provides the larger organization with expanded opportunities to connect with new audiences. For example, in the Summer of 2011 CHL presented a piece called *Beebo Brinker's Pulp Cabaret*. The piece was a presentation of the best of a series of burlesque acts that had been performed over three months in an outside venue. Funds from this performance would fund a fully staged production of Lily Tomlin's *Beebo Brinker Chronicles*, based on a popular 1950's lesbian pulp fiction series. Simultaneously, on the mainstage, ACT was presenting the Tony nominated *In the Next Room (or The Vibrator Play)*.

The shared lobby space hosted a collection of antique massagers provided by a local adult boutique. *Beebo* publicity included a series of costumed ladies posing in ACT's lobby windows while the audience for *In the Next Room* entered the theatre. The result was an immersive experience for both audiences. Each production served to stir interest in the other. Patrons from one show would ask questions to patrons from the other show, and vice versa. While the anticipated audiences for both productions were widely different, the proximity and shared lobby space provided both audiences with exposure to very different performance experiences. ACT, as the presenter, benefited from each production's exposure, and brought new audience members into the venue. Both *In the Next Room* and *Beebo Brinker* performed to standing room only houses.

If we look at theatre organizations as complex adaptive systems, we can better understand how these models affect the theatre as a greater whole. In the example of *Beebo Brinker* and *In the Next Room*, we can think of *In the Next Room* as the status quo. It is the mainstage production, programmed for the season before *Beebo Brinker* even applied for CHL partnership status. When the artistic department accepted *Beebo Brinker* into the CHL season, it began the

process of change. ACT's organizational structure operates, as many regional theatre companies do, with a series of small departments who collaborate to present theatre to audiences. The decision made by the artistic department affected the box office, the production department, marketing, development, operations, and audience services. Each of these departments had to shift to accommodate the new production. In some cases, this provided the organization with successful opportunities, such as the aforementioned *Beebo* window displays. In other cases, this presents challenges. Two simultaneous sold-out performances put immense pressure on ACT's box office operations and concession sales. Each show was forced to start late to accommodate the long lines caused by the successful productions. As a complex adaptive system, it must be understood that even the simplest change can cause ripples throughout the organization.

Intiman Theatre is experiencing how, left unchecked, those ripples can cause massive damage to an organization. In 2008 both ACT and Intiman brought in new executive leadership. The exact details of Intiman's collapse remain unclear. Rumors have spread about executive failures, overspending, and a negligent board. The official statement from the organization simply states that they were financially unable to continue with their current structure. As a result, the season was canceled and dozens of employees were let go. In turn, other local theatre organizations looked to hire the newly unemployed Intiman workers, displacing other local artists who relied on those over-hire positions. When looking at the effect of one organization on a community of artists, it can be concluded that artistic communities themselves are also complex adaptive systems wherein the actions of one can effect the actions of many.

As Intiman Theatre embarks on a new organizational model, it is looking at its artistic vision on a micro level. Rather than creating a six to eight show season on the mainstage, it is paring down to highlight the artistic strengths of the organization's members and create works

based on those strengths. As a supplement to that work, they will be partnering with and presenting the work of other organizations. Already, Seattle Shakespeare Theatre is presenting their season on the Intiman stage. From a financial standpoint, the organization must bring in income in order to pay the rent on the large theatre space that they lease from Seattle Center. It makes sense that they would be looking to sublet their space at this time. However, as evidenced by both ACT and ART, partnerships provide benefits beyond base financials. They serve to widen their reach into the community, creating mutually beneficial systems of support by embracing new audiences, new artists, and new conversations.

Part 4: Findings:

4.1 A note on the process:

This research began as a term paper about the history of the second stage. Through the last two years it has changed as I have, the main research question morphing as I began to explore deeper into the landscape around the regional theatre system. I began going to conferences where the topic of innovation would inevitably be raised. Keynote speakers would harp on it. Breakout sessions would discuss it. But I continued to be left with one larger question: How do theatre organizations use change management tools to implement institutional innovation? Or, in simpler terms, How do we get it done?

I have been involved in theatre since age 10, studied theatre directing and management as an undergraduate and began working for professional theatre companies directly after getting my Bachelor's degree. My academic and professional experiences have given me a strong background in the organizational structures of regional theatre companies, and knowledge of the factors that effect their operation. My conceptual framework (see Figure 1) was structured on this knowledge, starting with the assertion that changes in economics, labor and participation were having an effect on theatre organizations. Those outside pressures were forcing theatres to shift their thinking, to create a culture of innovation within their organizations. I predicted that those innovations would look toward the organization's venue, programming and partnerships. A wildcard area was also provided in my conceptual framework to represent areas of innovation that I had yet to discover. Each of these shifts in the organization would have to be guided in some way by principles of change management.

Initially, I planned on extensive organizational case studies. I selected three organizations that had been in existence for at least fifteen years and were actively engaging and promoting

new initiatives within the organization. I aimed to interview key executives within the organization, assuming that the organizational culture was dictated by these individuals and filtered down through the various departments. I would then spend a day at the organization, observing how the departments worked in relation to the theories of upper level management and identifying how management creates an innovative environment for their employees. In the evening, I would attend a performance and examine how these innovations affect the patron experience as the final product. My interviews and observations would be discussed alongside the organization's financials and public information from the field, including information from TCG and relevant press.

That plan, however, proved to be too expansive for the amount of time I had to complete my project. I revised my project, choosing to do an in-depth analysis of one organization and created a survey to send to executive level directors across the country. Unfortunately, that was also not meant to be. The revision of my human subjects clearance got caught up at the University of Oregon's Institutional Review Board for nineteen weeks. In order to graduate at the end of the Fall 2011 term, I had to restructure my research to rely only on publicly available documents and personal experiences.

It is difficult to assess how the internal structure of an organization works without having access to the people involved in the organization, as a great deal of relevant information is not readily available in newspaper reviews or press releases. As a result, the change management information presented in this project largely focuses on how outside organizations work to support the field in their attempts to innovate through programs such as TCG's A-ha! Think it/Do it project and EMC Arts' Innovation Lab for the Performing Arts. I sought to define theatre

organizations as complex adaptive systems, in order to provide an understanding of the general system that regional theatre organizations work under.

Luckily, I was able to gather enough information about ACT, ART and Intiman Theatres to use them as case studies for this research. Each of these theatres are nationally recognized for excellence, and discussed throughout the field. Information about projects at ACT and ART was widely available through their marketing materials and reviews, and both have directors who speak to the field about their initiatives as successful models. Intiman was a bit more challenging. Their crisis has been speculated on by the press, but the organization is fairly tight lipped about the factors leading up to it. It seems that organizations are happy to promote their successes, but hesitant to discuss their failures, a factor of the current philanthropic system's desire to fund strong institutions. As Intiman moves toward re-opening, they have provided information on their ideas and planning strategy, which allowed me a glimpse into their initiatives.

During this process, my research has come full circle back to the original term paper exploring the history of the second stage model. The academic journey that sought to explore the theory of how change management tools were used within theatre organizations lead me back to the practical applications of change management. Second stages offer a practical application for best practices in change management. Second stages, and their varied models, are the places where artists can experiment and the organization can as well. They are incubators. They are places where the stakes are low, where risks are encouraged, and failure is part of the process. While the process behind this conclusion was different than what I had proposed, this information offers the second stage model as an option for the field, and the lessons learned within these spaces can be applied to the broader scope of the organization.

4.2: Conclusion:

This research asked the question: How do theatre organizations use change management tools to implement institutional innovation? I don't have the answer to that question yet. Instead, my study provides an understanding of issues that theatre organizations currently face. It shows a snapshot of three regional theatre companies, and the innovative ways that they are working. If offers suggestions of best practices, and examples of initiatives in the realm of venues and programming. However, more information is required in order to truly understand how change management works in the field.

This research answers a different question: How are regional theatre companies implementing innovative programming within their organizations? As changes in economics, labor and participation bear down, theatre companies are implementing innovative programming by first examining their existing partnerships and resources. Theatre organizations will likely find a wealth of artistic talent right under their noses, being displayed in ways that they didn't know exist. The Creative Class requires a multi-faceted creative life, and will be largely unsatisfied without outside projects. A Pro-Am performer may be hiding behind the guise of a marketing director. Theatre organizations can begin with their immediate community of employees and artists, creating partnerships with artistic endeavors that they are involved with. In turn, this offers a more rewarding environment for staff members.

Intiman's reorganization into a collective model is an example of how organizations can create theatre that addresses the needs of the Creative Class and the Pro-Am artist. Many of the individuals that make up the collective are not professional theatre artists. Many have outside jobs that are not in theatre, but that does not diminish their relevance to the art form. Intiman has

recognized that their organization's survival depends on the influence of this greater community of voices. It is a modest start, as they are keeping their focus small at this time, but it opens the doors to more ambitious opportunities in the future.

As organizations examine their resources, they would be well served to examine their facilities for under used-spaces. Regional theatre organizations often run on a nine month season, leaving three months of the year without activity, or "dark". During those nine months there are five to eight performances, each running for four to six weeks. Weekly, performances are usually Thursday through Sunday, though larger organizations also show on Tuesday and Wednesday. A hypothetical theatre organization running a six show season, with each show performing four times a week for five weeks has 236 dark days in a nine month season. Of course, performances are not the only activity happening in a theatre. There is typically one week of tech before a production, and we can assume one week of load-in. With those days factored in, theatres are dark for 166 days during their nine month season. For theatre organizations with only one stage, there can be challenges involved in hosting performances during dark days, but these can be worked around. Theatre companies are drastically under utilizing their spaces, spaces that can be an exceptional resource for partnerships and revenue.

4.3 Further Areas of Research:

In a 2011 article titled "What Happened at Intiman: According to a bunch of people who won't go on record and how it effects arts organizations everywhere", theatre critic Brendan Kiley attempts to delve into the situation at Intiman, and is left short. Kiley says,

> For members of such low-stakes, chicken-feed industry, theater people are bizarrely
> resistant to speaking on the record about how and why things go wrong. It's easier to get

FBI agents to go on the record than arts administrators…We can't even begin to answer those questions or solve those problems until we admit that we *have* a problem- and begin talking about it. And we can only begin talking about the problem when people find the courage of their convictions and go on the record. (Kiley, 2011)

I have to agree. If we can't go into organizations and see their operations, if we can't break through the shiny exterior that marketing departments and executive leadership creates under the pressure of our current philanthropic system, then it is impossible to decipher how change management tools are used to implement institutional innovation. It is impossible to decipher what is truly successful and what is truly going wrong. Further academic research may be able to provide more insight into these organizational issues. Academia has the benefit of being a relatively neutral observational tool. If organizations are studied with some degree of anonymity, they can be provided with a safe space to communicate about their challenges and successes.

4.4: A Guide:

The cultural landscape is changing. Donations are changing. Participation is changing. Audiences are changing. In order for theatres to survive they must able to proactively respond to these changes. This isn't a new thing, changes are always happening. However, this particular shift has been accelerated by a recession that has put major strains on theatre organizations' financial resources. The current state of theatre, and the arts in general, is shifting from closed form institutions of elite artistry to grassroots organizations that provide opportunities for a wide variety of participants. While there needs to be a venue to showcase the work of the exceptional artists who have devoted their lives to their art form, these venues have become inaccessible to a wide segment of our population at a time when organizations need all the support they can get.

Creating opportunities to bring outside organizations and individuals into the fold allows organizations to break free of their culturally elite silos and are create works of greater relevancy to their broadened communities.

By adopting a second-stage model based off partnerships with outside organizations, institutions are able to create a thriving artistic environment within their organizations, one that does not require as many resources as the mainstage programming. Second stage partnership models serve as incubators for artists, providing them with professional training and artistic development within a safe space. They bring new voices and artistic vision into an organization, refreshing artistic vigor. They provide an income stream to both partner artists and presenting organizations, strengthening the economic backbone of the industry. They open the doors of the organization, bringing in audience members who may feel out of place within the hallowed institutional hallways. The future of the regional theatre system may depend on this re-imagined second stage system as a place where communities can come together to express themselves and participate in artistic ventures.

As I leave graduate school and embark on a new career path within my field, I will be taking with me five key findings on how we can best implement institutional innovation within our field. While I have specifically related these lessons to partner-based second stage systems, I believe they are applicable to the field as a whole. I share them, in the hopes that future emerging leaders can use them as they too embark on their new careers.

1. **Theatre organizations are complex adaptive systems.** Changes in one department affect the theatre as a whole and we must not think of our departments as singular organisms. This means that the lines of communication must be open across the

organization. When we fail to anticipate the effect that our actions have upon others, we face dissent within our organizations. Organizational buy-in depends on this respect and understanding.

2. **Innovation requires the input of many.** When we create silos and forget that organizations are complex adaptive systems, we are limiting our organization's capacity for innovation. By coming together across departments, we are able to see new perspectives, and gain new understanding that can lead to innovative ideas.

3. **Embrace the prototype.** Speaker Richard Evans asks that we embrace failure, a concept that sounds great in theory but is terrifying in practice. Beginning with a prototype can alleviate that fear. Create on a small scale, moving up and adjusting as time goes by.

4. **Create space for many voices.** The organizations that have been case studied were chosen for their attempts to open the doors of their organization. However, it must be noted that in opening those doors they were not seeking to displace their current audiences. Rather, they were creating pathways for new voices to join in with the established ones.

5. **Make the best of the resources at hand.** This research specifically looks at space as a resource, a difficult subject for many theatre organizations. Small organizations often have a hard time finding space to rehearse in, to perform in, and for administrative needs. Large organizations have to struggle with maintaining large spaces that are only filled

during the season's performance dates. Be aware of your organizations resources, consider their past uses, and how your organization can utilize them beyond their current incarnations.

4.5: Final Thoughts:

This research has examined the shifting economic climate, and changes in labor and participation needs that have been brought about by the rise of the Creative Class and the Pro-Am phenomenon, and how theatre institutions have reacted to these factors. It has largely focused on how organizations can create programmatic partnerships with outside organizations to capitalize on under-utilized resources and connections. By examining the activities of A Contemporary Theatre, Artists Repertory Theatre and Intiman Theatre, I have provided the field with three examples of organizations using innovative models in response to environmental changes. Each of these organizations is working to open up their organization, inviting in a new community of artists and participants. ACT and ART are engaging a younger audience through the transformation of spaces, creating venues that are more comfortable for their audiences. Intiman has shifted their entire structural model to bring in the voices of community partners on a leadership and artistic level.

As these trends continue within the American Regional Theatre System, they should continue to be examined. How will theatres sustain these partnerships, making them beneficial for all parties? What is the true economic advantage, or disadvantage of these initiatives? And perhaps the most important question of all: How can theatre organizations free themselves from perceived failure, and openly communicate about their struggles alongside their successes?

With these thoughts in mind, I recommend that the field continue to strive toward innovation at an organizational level as well as a programmatic level. I would like to see this innovation become proactive, rather than reactive, stemming from conversations that organizations have with their newfound partners and their connections to the community. The cultural landscape will continue to shift, and organizations who are nimble will be the survivors.

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