GLOBALIZING EL SISTEMA

Exploring the growth and development of El Sistema inspired programs around the world

Lauren R. Silberman

University of Oregon

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Master's Project

A Master's Final Project presented to the Arts and Administration Program and the Graduate School of the University of Oregon in partial fulfillment of the requirements for the degree of Master's of Arts in Arts Management.

GLOBALIZING EL SISTEMA

APPROVED: _____
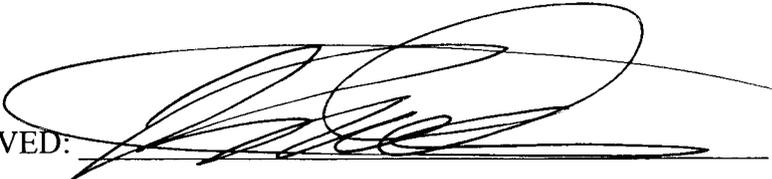
Dr. Patricia M. Dewey

Arts and Administration Program

University of Oregon

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Curriculum Vitae

LAUREN SILBERMAN

1913 Lawrence Ave. Eugene, OR 97405
silberman11@gmail.com • 650.296.7120

EDUCATION

M.A. Arts Management, Performing Arts Concentration   September 2010 – June 2013
Graduate Certificate, Nonprofit Management
M.M. Clarinet Performance
University of Oregon, Graduate School *Concurrent Master's Degree Program*

B.M., Clarinet Performance and Musicology   September 2004 – May 2008
Boston University, College of Fine Arts

EXPERIENCE

Marketing & Communications Coordinator – *full tuition remission & stipend*   Jan. – June 2013
University of Oregon Family Programs
- Manage monthly newsletter, website, social media profiles, and general communications for the Parent and Family Programs department and the UO Parent and Family Association
- Manage all print publications for the department and affiliated programs
- Provide administrative and event management support to the department

Special Projects   July – December 2012
University of Oregon Arts and Administration Program
- Designed, built, and populated database for arts management program and affiliated research center on the BatchBlue online platform. Conducted ongoing database training for staff.
- Managed integration of digital infrastructure during merge of administrative and research arms of arts management program during summer 2012

Graduate Research Fellow – *full tuition remission & stipend*   September 2011 – June 2012
University of Oregon Center for Community Arts and Cultural Policy
- Lead administrative coordinator for research center associated with UO Arts and Administration department (AAD) responsible for managing schedules, budgets, communications, general administration, and supervision of work study employees
- Communications Director for Eugene Arts and Economic Prosperity IV Study, a local chapter of Americans for the Arts year-long study of the economic impact of local arts organizations
- Responsible for writing and managing all publications, including quarterly eNews and yearly Annual Bulletin and Student Research Journal
- Other projects include database building and maintenance, research support, and event support

Graduate Intern   July – September 2011
San Francisco Opera Education Department
- Completed a ten-week graduate internship for the M.A. in Arts Management degree
- Worked with IT and Education departments to integrate several technology platforms into Education departmental activities, including Tessitura and Google Sites
- Developed online hub for all education programming and developed project design and implementation plan for Tessitura use
- Provided event support for Opera Ball and National Arts in Education Week activities

Lead Coordinator   February – May 2011
University of Oregon 2011 [m] concert
- Lead team of ten students who organized the third annual [m] concert, a free and volunteer coordinated "[m]odern festival of [m]usic" in May at the UO School of Music and Dance
- Lead artistic development team who coordinated performers and developed program, curated a room installation called *The Electronic Instrument Petting Zoo*, coordinated needed equipment for concert, coordinated day-of activities including management of over 50 student volunteers

- Wrote and implemented [m] concert communications plan, worked with School of Music staff to promote concert through print and digital media channels
- Built and populated website for event, created and maintained social media accounts, integrated QR codes to create digital program, created live blogging platform and training manual for audience

Administrative and Development Assistant   September 2010 – June 2011
Oregon Bach Festival
- Provided database and general administrative support to small nonprofit office
- Supported Director of Development in grant writing, corporate fundraising, and donor relationships

AmeriCorps*VISTA   April 2009 – April 2010
Music National Service, San Francisco Headquarters
- Provided administrative and capacity building support in the San Francisco based headquarters of fast-paced, start-up nonprofit working to launch a "musical Peace Corps"
- Projects included bookkeeping and HR support, database management, program tracking and evaluation, grant writing, volunteer recruitment, donor relationship management, website and social media maintenance, event support, and any other tasks as needs

Freelance Woodwind Instructor   September 2008 – Present
San Francisco Bay Area and Eugene, Oregon
- Provides private instruction and master classes on Clarinet, Saxophone, and Flute; sectionals on any instrument, small ensemble coaching, festival adjudication, and any necessary curriculum integration
- Students of Lauren's studio have participated in the CBDA All-State Honor Band, CMEA Bay Section Conference Honor Band, Alameda All-County Honor Band, and have received Excellent and Superior ratings at the CMEA Solo and Ensemble Festival.

ACTIVITIES & VOLUNTEERISM

World Traveler, Mexico, Israel, Austria, Holland, France, Italy, England…   July 1998 to present
Representative, UO Graduate School Student Advisory Board   September 2012 – June 2013
Venue Manager & Social Media Reporter, Oregon Arts Summit   October 2010 & 2012
Silent Auction Co-Coordinator, UO ELAN Annual Fundraiser, Eugene OR   February 2012
Graduate Student Volunteer, Arts Education Partnership Forum, San Francisco, CA   Sept. 2011
Curator, Electronic Instrument Petting Zoo, UO [m] concert, Eugene, OR   May 2011
Representative, Arts & Administration Dept. Student Advisory Group   March 2011 – June 2012
Soloist, MENC 42nd Northwest Division Conference, Seattle, WA   February 2011
Musician, Eugene Contemporary Chamber Ensemble, Eugene, OR   January 2011 – present
Report Writer, UO Sustainable Cities Initiative, Salem, OR   January – March 2011
Representative, UO School of Architecture and Allied Arts Vision Plan   December 2010 – present
Social Media Reporter, Public Folklife Symposium, Eugene, OR   November 2010
Member, UO Emerging Leaders in the Arts Network (ELAN), Eugene, OR   Sept. 2010 – present
Musician, Symphony Parnassus, San Francisco, CA   September 2009 – June 2010
Marketing Intern, Teatro Zinzanni, San Francisco, CA   January – March 2009
Auction Preparation Assistant, The Boston Harbor Association, Boston, MA   Jan. – July 2008

SKILLS

Admin: Community development, program design/evaluation, curriculum development, grant writing, website and social media maintenance, event planning and management, database building and management, HR/bookkeeping, volunteer management, corporate fundraising, photography

Technology: Mac and Windows, MS Office Suite, QuickBooks, Adobe CS5 (Illustrator, Photoshop, InDesign, DreamWeaver), SalesForce and other database platforms, Constant Contact and other email marketing programs, WordPress, Social Media (Facebook, Twitter, Tumblr, etc.)

Certifications: Red Cross First Aid, CPR for the Professional Rescuer, Lifeguarding, AED Defibrillation, and Water Safety Instruction; Safe Zone LGBT Ally

Abstract

This final project is designed to explore and describe the emerging international field of orchestral music education programs inspired by Venezuela's "El Sistema." El Sistema is the nickname for a publically funded social and community development program that uses the collective practice of music to affect social change. The program model is reinvigorating and diversifying the fields of orchestral music and music education, while also fighting poverty through access to the arts. This study aims to map the international network of programs inspired by El Sistema through information collected from a literature review, qualitative questionnaires for emerging programs, and semi-structured interviews with leaders from the global Sistema movement. The data collected for the project is used to map the emerging field of El Sistema inspired programs and to conduct a needs assessment for international support structures serving the field.

Research Questions

Main Research Question: Who comprises El Sistema internationally and what additional structures are needed to encourage continued international growth of the El Sistema network?

Supporting Questions:

- What are the key elements of an El Sistema inspired program?
- How and where is the original Venezuelan model of El Sistema being duplicated around the world?
- What resources and organizations promote the international growth of the Sistema field?
- What strengths and challenges face the growth of the global El Sistema movement?

Keywords

El Sistema, youth orchestras, classical music, music education, international cultural policy,

community development, cultural mapping, art and social development, Venezuela, peace

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Chapter One | Introduction to the Study

Introduction

The world of orchestral and Western classical music has contracted sharply over the last several decades. Audience attendance at classical music concerts has declined and many orchestras in the United States and internationally have declared bankruptcy and closed their doors. In 2012, the National Academy of Recording Arts and Sciences of the United States discontinued the Grammy Award for Best Classical Album (Hu, 2012). Decreased funding for the arts along with increased options for entertainment during leisure time have drawn audiences and their consumer habits away from symphony orchestras and other forms of classical music. On the educational level, robust in-school orchestral programs have been the victim of budget cuts in the United States and are no longer the norm. Extracurricular youth orchestras are no longer primarily overflow programs for orchestral instruction offered during classroom instruction time, and now have a smaller pool of students from which to pull. The students who can participate are increasingly those whose families can afford to financially supplement their child's music education. As a result, United States orchestras and their audiences are predominantly white and from middle to upper class backgrounds. The members and audience of today's orchestras no longer reflect the ethnicities of their respective local community members, and as a result communities are no longer identifying with and championing their local symphony orchestras (Clements, 2006). Without cultural relevance or strong financial support, the sustainability of classical music and music education programs are called into question.

Despite ongoing budget cuts to music and music education programs, music education and specifically youth orchestras continue to be a thriving industry in the United States and around the world. The U.S. Department of Education's Fast Response Statistical Survey's Report on Arts Education states that more than 90% of United States public elementary and secondary schools offer some form of music education (League of American Orchestras, 2012), although not all of these include orchestral programs. Countless nonprofit organizations are running youth orchestras and extended orchestral training programs, from high-powered programs associated with major symphony orchestras to smaller community based programs with several performing groups at various ability levels. Surprisingly, a new network of youth orchestras has flourished in Venezuela over the past several decades, inspiring a new movement of similar programs that has spread around the world over the last five years. This movement began when a man named José Antonio Abreu founded the first Venezuelan youth orchestra in 1975, which has grown into a robust federally funded network of programs nicknamed "El Sistema." Even more surprising, the single most defining feature of El Sistema is not that it is an orchestral training program; instead, it is self-defined as a social and community development program that uses the collective practice of music.

Musicians and teachers inspired by the story of El Sistema in Venezuela have started El Sistema inspired programs around the world, from Scotland to Armenia and the United States to New Zealand and many countries in between. Networking and support organizations have started to support the growth of the Sistema movement including El Sistema USA and the National Alliance of El Sistema Inspired Programs in the United States as well as Sistema Global, Sistema Europe, Sistema Africa, and many national networks. Most of these networks

are currently managed by dedicated volunteers. In surveying the various stakeholders that make

up the Sistema field, author and El Sistema USA advisor Tricia Tunstall (2012) writes that there

is "a clear and defining internal alignment with Abreu's principles and worldview. The vision

they [the programs] share is remarkably consistent, and yet there is no sense of a party line; it

seems, rather, to be a lived community of shared values" (p. 45). Indeed, this unique community

is quickly growing and expanding around the world.

Background

Youth orchestras programs like El Sistema are traditionally funded by private donors,

foundations, and program fees, and are not widely supported by public funding. Governments

have traditionally supported the organizations with arts based programming through cultural

policy that supports Western classical art forms, the institutions that present and support these

forms, and arts education in the traditional disciplines. This model is challenged by the changing

and increased diversity of our global society. In describing this phenomenon, Keller (1990)

writes "In the last forty-five years, the peoples of the world have passed through the Cold War

transition and emerged an increasingly interdependent global culture with unprecedented

technological and economic connections" (p. 151). Traditional cultural institutions have not kept

up with this change, with arts policy and institutions lagging in the challenge of cultural

evolution and ethnic diversity (Keller, 1990). After decades of declines in funding and

community support for these programs, this traditional model of government funding is in

question. El Sistema is blazing a new trail in cultural policy as a social organization that uses

music instead of a music organization that benefits society, the most important distinction of the

Sistema program model. With this new definition, previously untapped public funds in the areas

of social, educational, and community development are potentially open to arts based programs.

Problem Statement

Since the original El Sistema program was founded in 1975, the network of El Sistema

related programs has experienced steady growth in Venezuela as well as in neighboring Latin

American countries. While these programs have enjoyed healthy regional growth in Latin

America for decades, El Sistema inspired programs have grown to become a worldwide

phenomenon over the past five years. In 2008, a successful student of the program, Gustavo

Dudamel, was appointed Music Director of the Los Angeles Philharmonic, which he began

conducting in the 2009-2010 season. In 2009, founder Abreu was awarded a TED Prize the

Crystal Award of the World Economic Forum. Since that time, El Sistema inspired programs

have been identified in almost 60 countries around the globe and over 60 programs have

emerged in the United States alone (El Sistema USA, 2012). But due to the quick growth of the

Sistema inspired field, associated research has not kept up with program growth. Only a handful

of studies and publications have specifically examined the El Sistema program model in

Venezuela, the United States, and a few international programs. Tricia Tunstall wrote the first

English language book on the El Sistema movement in 2011, called *Changing Lives: Gustavo*

Dudamel, El Sistema, and the Transformative Power of Music (Tunstall, 2011). The book tells

the story and history of development of the original Venezuelan program and the El Sistema

inspired programs in the United States. More recently, Sistema Fellow José-Luis Hernandez

Estrada has written the second book on El Sistema called *Aesthetics of Generosity: El Sistema,*

music education, and social change (Estrada, 2013), made up of 32 vignettes that reflect on his

experience as an artist-in-residence at *núcleos* – or community music centers – throughout

Venezuela. In 2009, peer-reviewed articles began to emerge about the program, including

reflections from theater artist and arts educator Eric Booth (Booth, 2009; 2011), a series of

studies on an El Sistema inspired program in Scotland from Julie Allan and a team of researchers

(Allan et al, 2010; Allan, 2010), and an article on an El Sistema inspired program in Australia in

the *British Journal of Music Education* (Murphy, Rickard, Gill & Grimmett, 2011). The most

widely distributed article about El Sistema is from Sistema Fellow Jonathan Govias (2011),

called "The Five Fundamentals of El Sistema," which outlines the overarching mission and

activities of El Sistema inspired programs around the world. Since 2012, there has been a boom

of research adding to these initial studies. Maria Majno (2012) has written about Sistema Italia

while other researchers have begun to explore the broader social implications of the El Sistema

model including Campe and Kaufman (2011), Olsen (2012), Uy (2012), and Victor (2012).

Several graduate level research projects have explored El Sistema inspired programs as well

from a wide range of institutions including Munich University (Billaux, 2011), University of

Glasgow (Borchert, 2012), University of Cincinnati (Cline, 2012), Mount Ellison University

(DeSilva & Sharp, 2012), Catholic Cathedral College (Henley, 2010), Arizona State University

(Hollinger, 2011), the Teachers College at Columbia University (Rodas, 2006), and the

University of North Carolina at Greensboro (Shoemaker, 2012). Beyond this, several

documentaries and television features, online blogs maintained by El Sistema enthusiasts like

Marshall Marcus and Geoff Baker, and many news articles have reported on the growth of the

movement. The most notable documentary is Alberto Arvelo's 2006 film *Tocar y Luchar*, which

was made before the program was widely known about outside of Latin America. This overview

of available resources reveals a clear gap and need for more research and exploration of the

global Sistema movement.

    In particular, no official research has been done to explore the Sistema program model

with an international lens and perspective. There is a scarcity of public information about how

the different El Sistema inspired programs around the globe are structured and funded, how their

curriculum is developed and implemented, and how these programs work to carry out the

original social and community development mission of the Sistema model. This study will

attempt to contribute to this knowledge base by conducting a broad qualitative survey of

international El Sistema inspired programs and semi-structured interviews with leaders of the

global Sistema movement. Information gathered will be used to create a descriptive cultural map

of El Sistema as well as a needs assessment for international support and networking structures

within the movement. It is hoped that this map and suggestions for strategic growth will help

support the continued development of El Sistema inspired programs around the globe.

Purpose Statement

    The purpose of this qualitative study is to gather a holistic picture of the worldwide social

development and orchestral music phenomenon known as El Sistema, specifically looking at the

varied stakeholders that make up the El Sistema inspired network and identifying needs for

continued international growth. In this exploratory study, data gathered is used to create a

cultural map of the El Sistema field that determines the current scope, structure, and needs of the

global network. It is hoped that this study will help fill a gap in peer-reviewed research on the

recent international growth of El Sistema, and will help support the continued growth of the

field.

Research Lens

  As a researcher, I come to this project with a broad and varied background in the field of

instrumental music education as a student, teacher, administrator, and advocate. My entry into

the field of classical music began as a clarinetist, and I hold both Bachelor's and Master's

degrees in Clarinet Performance. During my progress as a clarinet student, I engaged in the

music education field at many levels, including attendance of a public arts high school, regular

private lessons, and participation in extracurricular youth orchestras (which required monetary

dues) as well as other honor bands and orchestras. As a music teacher, I first taught clarinet at a

middle school in the under-resourced Hunter's Point neighborhood of San Francisco as part of a

yearlong high school service-learning project. Since then, I have gradually gained experience

teaching private lessons, sectionals, and ensemble coachings for a range of woodwind

instruments in communities with low access to the arts and other resources. As an administrator,

I have worked at a variety of music education organizations ranging from regional music camps,

national music education programs, and internationally recognized performing arts

organizations. And as an advocate, I have devoted my academic and professional pursuits to

increasing access to music education.

  This research fulfills the terminal research project requirement for the Master's of Arts in

Arts Management. This final project has resulted from a long familiarity with and respect for El

Sistema and the network of programs it has inspired. I first became acquainted with the program

as a clarinet student in Boston, and excitedly watched the world become increasingly more aware

of the program after the publicity boom surrounding Dudamel's appointment and Abreu's

international awards. I have followed the program and the development of the global movement

because the mission of the program closely aligns with my personal advocacy work to increase

access to the arts, especially in under resourced communities. I believe that the program mission

and model work and should be emulated around the world. I hope that this project will

contribute to the growth of the field of El Sistema inspired programs and other innovative arts

programs working for social change.

Overview of Document

This document reports on the process, data, and findings of the *Globalizing El Sistema*

terminal research project. The next chapter provides an overview of the entire project,

discussing the research questions and strategy of inquiry, significance of the study, data

collection and analysis procedures, and other aspects of research design. The third chapter offers

a two-part literature review, exploring the development of Western classical music education and

the development of El Sistema. The fourth chapter explores the findings of the study, discussing

data collection and analysis. The fifth chapter presents the study's findings on the international

growth of El Sistema, and serves as the core of the descriptive cultural map developed as a result

of this project. The sixth and final chapter explores the recommendations and conclusions

resulting from data analysis and the project as a whole. Additional materials related to the

project are included in the Appendices for reference.

Chapter Two | Project Overview

Methodological Paradigm

This research project is situated within a social constructivist methodological paradigm, described by Creswell (2009) as the assumption "that individuals seek understanding of the world in which they live and work" (p. 8). Also called interpretivist, this type of research relies as much as possible on the participants' views of the situation being studied, and the many varied, multiple, and complex views that result from their individual experiences. Social constructivist researchers agree that humans engage with their world and make sense of it based on their own historical and social perspectives, and that interpretation of these views and perspectives is also shaped by the researcher's own experiences and background. This worldview allows participants of the El Sistema inspired field to drive the mapping and needs assessment aspects of this research project, using them to understand the historical and cultural settings of the international growth of the El Sistema model.

Research Questions

Using the interpretivist lens, this exploratory and descriptive research project will address the primary question: *who comprises El Sistema internationally and what additional structures are needed to encourage continued international growth of the El Sistema network?*

Emphasizing the importance of the whole network as well as the interdependence of its parts, additional sub questions will be addressed, including:

- What are the key elements of an El Sistema inspired program?

- How and where is the original Venezuelan model of El Sistema being duplicated around

  the world?

- What resources and organizations promote the international growth of El Sistema field?

- And what strengths and challenges face the growth of the global El Sistema movement?

Definitions

The following terms have been defined for the purpose of this study:

Orchestral music education is being defined as music instruction and programming that emphasizes the Western classical tradition of music, specifically focusing on the symphony orchestra and its related instruments.

The broader categories of *music education* and *arts education* are also mentioned in this study. In this case, these terms emphasize the traditional Western classical arts disciplines and traditions, extending beyond the symphony orchestra and music. Both terms can also be interpreted across all music and arts learning opportunities beyond Western and classical fields. In particular, the El Sistema program focuses on ensemble based instruction afforded by a symphony orchestra, which emphasizes the group and peer learning opportunities available in a large musical ensemble.

El Sistema inspired programs is defined as any organization that uses the Venezuelan program model El Sistema as an inspiration for mission and a template for programming. This study focuses on social and community development programs that run youth orchestras and increase access to music education opportunities, but the term is not solely limited to music

based programming or organizations. The terms *field of Sistema inspired programs* and *global Sistema movement* are used to reference the network of these types of programs.

   Transnational organizations are explored as an aspect of this project. They are being defined as international non-governmental organizations that operate in many different countries and nation states around the globe.

   Cultural mapping is being defined as the process of collecting, recording, analyzing, and synthesizing information in order to describe the cultural resources, networks, links, and patterns of usage of a given community or group (Stewart, 2010). According to UNESCO Bangkok, "Culture and experience shape belief systems, the direction of education, the media, tourism, community development, planning, and creative industries, which in turn influence people's perceptions of places." Cultural mapping, both literally and metaphorically, focuses on understanding all of the factors that make up a community. Data collected can be represented in a variety of formats from graphs to maps to databases. The participants and their identified needs within the Sistema inspired field informed the content of the cultural map developed as part of this research project, explored in Chapter Five.

Delimitations

   This study is limited to programs and organizations that self-identify as an El Sistema inspired program, run or are working to run a openly accessible youth orchestra, and have publicly available or accessible contact information. Data collection and recruitment materials for the project were digitally built and distributed via the internet. The project was further delimited to programs and individuals with access to both a computer and the internet, and the

ability to speak English or Spanish. Bilingual questionnaires were disseminated to as many of these organizations and programs as possible, through the networking organizations currently supporting the emerging field. Interviews were conducted in English with strategic leaders of the global Sistema movement from both North America and Europe.

Limitations

The emerging nature of the global Sistema field is the primary limitation of this study, as it is difficult to explore the nature of a growing phenomenon through a static report. Momentum around new programs, reports, and activities related to Sistema inspired programs produce information at a fast pace, making it difficult to fully report on the fast growing field. Another limitation of this study is the finite timeline for data collection and reporting. As a result, this project offers a snapshot of the global Sistema movement around June 2013; information about the growing field could only be included in the data collection process through May 2013. Unfortunately, the information presented in this report will be outdated as soon as it is published, but it can still be generalizable across the emerging field of Sistema inspired programs and other innovative ideas to use the arts for social change.

Since this project is made up of programs that self-indentify as Sistema inspired programs, the study is methodologically limited by the self-reported nature of the data. The data was used to compose a representative map and assessment of the emerging field of Sistema inspired programs, so it relied on the truthful reporting of program and other data. However, there is no mechanism in place to verify reported data or to measure El Sistema inspired programs across the emerging global field. For this study, the broad sample of programs and

individuals surveyed for this project ensured a representative distribution of the data and assessment of the field. Another primary methodological limitation of this program is the lack of internationally unified research on music education and the particular gap of research related to the El Sistema program model and network. This lens of Western classical music and music education is used to limit the scope of the study, as well as the lens of instrumental music education in the United States. The large infrastructure and resources for music education in the United States as well as affiliated fields of research render it a global leader in music education policy and programming. Further limitations included the language barriers among various international members of the Sistema inspired field as well as access to and communication with diverse international programs and organizations.

The study is also limited by the cultural bias of the researcher. As a musician and music teacher in the United States, I sit within the lens of Western classical music and music education. My experience is further informed by my worldview that access to the arts is inherently good and positively supports both child and community development. This project starts from the assumption that programs working to build community through arts access helps address chronic social problems around the world, and should be explored as new pathways to an equitable and peaceful global society.

Significance of the Study

Through this research study, it is my goal to provide a reference tool for the emerging global Sistema movement by identifying who and what make up the network of Sistema inspired programs, channels of available funding and research, program models currently operating in the

field, and how the principles and values of the original El Sistema program have disseminated around the world. The potential benefits to study participants include exposure of their programs within the Sistema field as well as identification of the network of organizations, policies, and available resources supporting the growth of the movement.

This study will serve as the first formal examination of the global expansion of El Sistema inspired programs, and serves to benefit the international field of El Sistema inspired programs. It is hoped that the research conducted will help fill a vital gap in providing information about this quickly growing area of orchestral music education, illuminating international resources available to these programs, and examining the Sistema inspired field's relationship with the larger field of classical music. Additionally, the information gathered will be of great interest to support networks like Sistema Global and may contribute to the development of future El Sistema inspired programs.

Research Design

This study worked to gather a holistic view of the Sistema inspired field and its needs for continued growth through a qualitative study of the field, including a comprehensive literature review as well as two-tiered questionnaires and semi-structured interviews.

In order to gain a broad understanding of the field, this research project began with a *literature review* of available resources concerning El Sistema. The literature review also explored El Sistema's position within the larger field orchestral music education as well as the international cultural policies and politics affecting the field.

The key tool in mapping the international growth of El Sistema was a qualitative *two-tiered questionnaire*, available online in both English and Spanish through the website http://globalizingelsistema.wordpress.com/. The first tier was a basic questionnaire that gathered indentifying information about organizations and programs within the Sistema inspired field. The second tier was an optional expanded questionnaire that explored funding, partner, student population, program staffing and structure, and other relevant information about El Sistema inspired programs.

The key tool in identifying needs for continued international growth of El Sistema was qualitative *semi-structured interviews* with key informants from the global Sistema movement. These one-hour interviews were conducted by telephone or internet video conferencing program Skype. All interviews were digitally recorded and summarized with selective transcription.

Strategy of Inquiry

As stated above, this research project is a qualitative study working to map and assess the international Sistema inspired field. According to Creswell (2009), "Qualitative research is a means for exploring and understanding the meaning individuals or groups ascribe to a social or human phenomenon" (p. 232). Common aspects of qualitative research include gathering data in a natural setting, the researcher as the key instrument, multiple and triangulated sources of data, inductive data analysis, the use of a theoretical lens, and interpretive as well as holistic approaches to the issue being addressed by a study. This particular study borrowed ethnographic methods of inquiry, where an intact cultural group – in this case, members of the Sistema movement – is studied in a natural setting over a prolonged period of time by collecting

observational and interview data (Creswell, 2009). Three data collection methods were used to triangulate data sources, in order to provide a holistic and comprehensive cultural map of the Sistema inspired field.

Anticipated Ethical Issues

All research concerning human subjects presents possible risk to participants. In the case of this study, participation will potentially increase visibility for international El Sistema inspired programs, and particularly for the programs that chose to participate by completing the questionnaire. It is hoped that this increase in visibility will benefit programs, but could also bring increased scrutiny or possible criticism of program design. This project is also working to identify resources and support networks available to these programs, offering information on resources available to organizations if any issues arise.

In this project, interview respondents are identified by name and role within their program or organization. Interviews with Sistema inspired program staff had potential to reveal sensitive information about the interviewees, their organizations, and their program partners. Member checks were employed to ensure participants would maintain control of their voice and representation in the study and final report.

Data Collection and Analysis Procedures

The variety of qualitative data collection techniques employed in this study offered a broad understanding of the field. Interviews were conducted with strategic leaders of the global Sistema movement and questionnaires were targeted to El Sistema inspired programs.

Interviews were digitally recorded, summarized, and selectively transcribed, and interview coding sheets used to help triangulate data across collection channels. Data collected was summarized into Excel worksheets that were studied for potential patterns and common themes.

Data Collection Instruments

The research instruments developed for this study include a coding form for interviews (See Appendix F), a two-tiered questionnaire available in English and Spanish (See Appendices B and C), and a list of interview questions (See Appendix E). Written interview notes and selective recording transcription were used along with the coding form to summarize interviews.

Recruitment and Consent Forms

Research participants were recruited through email correspondence, and sample recruitment emails are included in Appendix A. Bilingual questionnaires were distributed through online Sistema related forums and the support networks serving the Sistema inspired field. The questionnaire began with consent language addressing any potential risks to participating, and clear ways to follow up if the participant had any questions or concerns. Consent was assumed for those participants that choose to fill out the questionnaire after reading the consent language. Consent forms were administered to every interview participant, requiring their written confirmation that they had received and read the form. All consent forms were provided in English as all of the interview participants spoke English fluently.

Data Management and Confidentiality

All research instruments were produced digitally. Digital copies of all coding sheets, survey information, interview recordings and summaries, and other documents generated as a result of this project were saved and password protected on my personal laptop and backed up on an external hard drive. These files will be saved for three years beyond the length of the project, at which point they will be deleted.

Coding and Analysis Procedures

Initial inspiration for data coding came from the El Sistema USA survey of El Sistema inspired Programs in the United States, hosted on their website with sections covering community partners, student population, program staffing and structure, curriculum, funding, and general organizational information. These were identified as areas of interest in profiling the new and developing El Sistema inspired programs around the world. Further and more detailed coding emerged as the project progressed, including program mission, growth, and support as well as movement growth, leadership, and gaps in research.

Analysis procedures included an examination of the data at multiple levels and data transformation. The literature review and quantitative survey gathered results on one level, while the qualitative interviews were conducted at another level to explore the growth of the field with specific individuals. Through a coding of qualitative data and an exploration of themes revealed by the quantitative data, a broad overview of the international field of El Sistema inspired programs and the organizations, networks, policies, and resources supporting the growth of this field was constructed.

Validity

The triangulation of data collection methods – literature review along with qualitative questionnaires and interviews – worked to enrich the data for a layered analysis. Coding was used to help identify themes across the multiple sources of information. Member checks were also employed to validate data after preliminary findings were identified, facilitating engagement of study participants in representative feedback.

Chapter Three | Literature Review

Part One: Development of Western Classical Music Education

Introduction

In the past twenty years, changing landscapes in the global arts industry have threatened Western classical music at every level. Developments in technology and increased access to digital media have increased our social interaction with music, but our music education has done little to maintain pace with these advancements. Our society is full of people who used to play a musical instrument in school, but now stay engaged with music through cell phones or other portable media players. Music is thriving in this country, but music education is not (Reimer, 2004).

Development of Relevant International Cultural Policy

In the Western world, there is a strong history of support for the classical art forms. Europe has a strong tradition of support for the arts, which has historically manifested in two styles. Former absolutist states maintained a substantial tradition of government patronage for the arts throughout out their history of court society. On the other side, more plutocratic, mercantilist states like England and the Netherlands had smaller traditions of government patronage for the arts (Cummings, 1991). The United States followed the tradition of England's smaller federal support for the arts, and did not consider the arts a national priority during its early nation building days. According to Cummings (1991), John Adams was known to say that "he had to study politics and war, so that his sons could study mathematics and philosophy, in

order to give their children a right to study painting, poetry, music, and architecture" (p. 32).

Although a strong tradition of private financial support for the arts developed, the United States

waited 176 years before committing to direct financial support for the arts. The earliest support

for the arts came in the form of commissions for pieces of public art and eventually developed

into a tax-deductible system of private patronage. Private citizens who make donations to

nonprofit arts organizations can earn a variety of tax deductions. In the 1950s, the United States

government supported international cultural exchanges; the decoration of public buildings,

money, and stamps; as well as its own government art collections before founding the National

Endowment for the Arts and Humanities in 1965 (Cummings, 1991). Unfortunately, the strength

of these twin foundations has been weakened over time by bureaucracy, bifurcation, and the

constantly changing political climate. On a local level, municipalities and states have also

maintained significant expenditures for the arts across the United States.

In addition to cultural policy that sustains the arts as a cultural tradition, the Western

world has a smaller tradition of using the arts to benefit social good. In the nineteenth century,

music education was promoted in both Britain and Germany as part of a drive for moral and

religious improvement, beginning a history of music being used for social good (Baker, 2013).

More recently, a UNESCO Working Document on Arts Education (Wagner et al, 2006)

explained, "Fostering a sense of community and cultural citizenship is a key role played by arts

education. The majority of countries in the Europe and North American region rate the social and

cultural aspects as principal benefits of arts education at primary school level. There is a strong

connection that exists between the peaceful expression of cultural diversity and active

citizenship" (p. 32). In both England and the United States, the Settlement House movement in

the beginning of the twentieth century funded houses in low-income areas, where middle-class volunteers lived on site to promote cultural activities aimed to alleviate community poverty. From 1935 to 1943, the United States also funded the Works Progress Administration (WPA), which directly employed artists to combat unemployment during the Great Depression. The WPA program ultimately employed 40,000 people, commissioned 1371 murals, maintained a symphony orchestra, and also extended to include the Federal Theater Project and Federal Writers Project (Cummings, 1991).

The United States funded arts for social benefit more consistently through its inclusion in the public education system. In the late nineteenth century, the United States decided to take on large-scale social responsibilities like mental health services and free, public education. Education was a way to simultaneously provide the populace with employable skills and train people to be good citizens (Wolf & Burger, 1991). Arts education in the form of youth orchestras and choirs were present from the start, giving students the opportunity to collectively make music together. This system eventually developed into a concentration on different artistic disciplines, with national arts education standards laying out steps toward creating, studying, experiencing, and developing skills in and knowledge of various Western classical arts disciplines.

At the turn of the twentieth century, large artistic and intellectual development recognized arts experiences as the grounds for self-discovery, invention, and self-expression. And more recently, the development of new medias and technology has led to a 'cognitive revolution' or what Wolf and Burger (1991) call a "paradigm shift [that] stressed the human mind's ability to deal in rules, concepts, symbols, and representations" (p. 131). The arts teach

important skills like creativity and critical thinking needed for the emerging culture of the

twenty-first century. Important international cultural policy institutions like UNESCO have

recognized this value as well.

History of Western Classical Music Education

Music education in the Western classical tradition has been documented as early as

ancient Greece and Rome (Anderson, 2012) and has continued to grow throughout the

development of Western culture in Europe and later in North America. It was fostered and

developed in churches and principalities before the emergence of a middle class. The growth of

musical connoisseurship among the European elite helped music and music education gain

importance in secular as well as religious and political settings (McCarthy & Goble, 2011).

Western classical music education first entered the public school curriculum in the 1830s.

By the 1920s, music education had primarily developed into private instruction that supported

music making at home, and was primarily available in urban communities. During the 1930s,

several social conditions helped expand and institutionalize music education. Automobiles

became more prevalent, and the increased mobility changed community life, increasing access to

resources that were not previously available to rural communities. Prevalence of radios and

phonographs also increased, which in turn increased access to music (Pitts, 1939).

In the United States, President Franklin D. Roosevelt's New Deal rebuilt the American

school system infrastructure. By 1939, American schools had new facilities, often with the best

auditorium in their town, and boasted un-crowded and stable student populations (Hanshumaker,

1989). The arts were included in the core curriculum of public schools, allowing anyone with

interest to participate in music. In these conditions, public school music programs flourished and most public high schools usually had both an instrumental and choral music teacher. Carl Seashore summarized it best in 1940, writing "Up to the end of the past century, youth had had no significant opportunities for music in the scheme of things… Music for youth has been discovered in the past forty years" (p. 273).

The 1940s was the golden era of public music education in the United States. Music ecosystems developed around the strong infrastructure that was built in the 1930s. Both youth and community orchestras were founded in communities across the country as an outlet for continued music instruction and involvement outside of the classroom. This open access to music education continued until the population boom of the 1950s began impacting schools and school resources. The United States government built more schools, but focused on keeping costs low. New schools featured "cafetoriums" or multipurpose rooms with poor acoustics that combined auditoriums, gymnasiums, and cafeterias into one shared space. Over time, school periods were cut down to keep teaching costs lower and standardized testing became more prevalent (Hanshumaker, 1989). All of these developments damaged public arts education by pushing it out of the core curriculum.

By the 1960s, music education in schools was no longer a national priority, and problems facing public education continued to compound as the student population became increasingly mobile and increasingly made up of students from immigrant families (Hanshumaker, 1989). Aging school facilities no longer provided adequate space for these programs (Gillespie & Hamann, 1998). Hanschumaker (1989) wrote, "While once common in most of these cities, thriving high school instrumental music programs are now the exception rather than the rule...

High School performance programs still seem to fare best in small towns with middle class

values" (p. 34). The term values can be interpreted as economically stable communities with the

tax base to support arts programs now considered primarily extracurricular. All of this affected

music education by weakening public school programs and decreasing enrollment in arts classes.

Ongoing budget cuts to education in the United States and the economic crises of 2001

and 2008 have continued to compound the myriad issues facing Western classical music

education, reducing funding and demand for orchestral music and music education programs in

the United States. Instead of having two music teachers per school site, schools now often have

music teachers who are responsible for multiple sites, offering once a week instruction at

different schools throughout a school district (Gillespie & Hamann, 1998). Overall, most music

education programs available today only offer the traditional educational model of Western

classical music, which no longer reflects the culture of the entire student population.

Development of United States Youth Orchestra System

Youth orchestras were originally a gathering place for exceptional young musicians who

were not challenged in their school music program. These supplemental programs were first

developed in the 1920s, but the industry in the United States expanded in the 1940s along with

the expanding field of music education in public schools. In 1956, E. Gordon wrote, "Youth

Orchestras have grown into community symphony orchestras – some 3000 of them in the U.S.

today" (p. 39). Despite the music education cutbacks in the 1960s, youth orchestras in the

United States continued to flourish and began to compete with school orchestras for students.

Professional organizations took note and the League of American Orchestras set up a division

devoted just to the growing field of youth orchestras (Avshamalov, 1979). Even as the

population became increasingly urbanized, with 76.9% of the U.S. population living in

metropolitan districts in 1989, the larger ecosystem of music education and youth orchestras

continued to grow (Hanshumaker, 1989). These urban areas developed thriving youth orchestra

programs, with active private lesson teachers and sectional coaches supporting programs through

specific instruction on orchestral instruments (Hanshumaker, 1989).

Today, youth orchestras are a thriving industry in the United States. Across the county,

hundreds of nonprofit organizations are running youth orchestras and extended orchestral

training programs for children ages 5 to 18, and in some cases to age 21 and beyond. These

programs come in all shapes and sizes, including high-powered programs associated with major

symphony orchestras, smaller community based programs with several performing groups at

various ability levels, and festival orchestras such as an all-county or all-state orchestra. The

majority of these programs have significant participation fees, although there are scholarships

and sponsorship programs available to students with either great merit or financial need.

As an extension of the orchestral music industry, youth orchestra organizations are the

first training ground for future professional classical musicians. A 1978 survey of professional

orchestra musicians found that all musicians surveyed were introduced to music while in

elementary school and began performing on their instrument while in middle school (Shetler,

1978). The training and experience provided to young students in youth orchestras helps prepare

them for collegiate or festival auditions, which in turn prepare musicians for a career in

performing or teaching classical music. It is hoped that these students continue on to

conservatories and summer music festivals that continue to foster their professional career.

Many of the flagship youth orchestra programs in the largest American cities boast lists of

alumni in major professional symphony orchestras (Avshalomov, 1979). But with the costs

required to participate for both training programs and equipment, large sections of communities

are unable to participate in the professional training pipeline.

Current State of Music Education Field

Most public music education programs in existence today look much like the music

education programs that were created in the 1800s, despite the effects of the industrial

development during the 1930s. David Williams (2007) writes, "Pressure to maintain both the

size and quality of performance groups is often similar to the pressure athletic coaches

experience. Partly because of these expectations, K-12 music teachers historically have had very

little motivation to modify programs that haven't changed in any substantial way since the early

1900s" (p. 19). These music programs were created in the nineteenth century, when people

primarily interacted with music by performing it. As modern inventions like the phonograph and

radio were developed, the cultural focus began shifting towards interacting with music by

listening to it (Williams, 2007). With the technological advances of the digital era, culture has

become more visually driven and participatory, and the lines between listening to, performing in,

and creating musical experiences have become increasingly blurred (Vincent & Merrion, 1996).

But throughout these developments, music education is at risk of irrelevancy because the field

has done little to reflect the changing needs and culture of its students and communities.

The average public Western classical music education program today is made up of

larger performing ensembles, usually bands, choirs, and orchestras, while occasionally including

jazz bands and show choirs. Elementary program activities usually include singing, playing a recorder or other instrument, and learning how to listen to music. Secondary program activities usually include performing ensembles that traditionally focus on Western classical music traditions. The true focus of these programs is performance techniques and skills related to national arts education standards, not musicality (Williams, 2007). As a result, most programs only cover the singing and playing an instrument aspect of musical training.

Supporting these programs is a wide array of higher education programs, research and scholarship, journals and books, and both national and state professional organizations. However, this supportive structure does not necessarily reflect the actual instruction offered to students. Reimer (2004) writes, "The picture emerging from this overview is of an inverted pyramid. An enormously deep and broad facilitation enterprise rests on a very narrow base of what is actually offered to students in schools" (pp. 33-34). At the elementary level, students usually have a limited weekly time with a music specialist who travels from school site to school site. Beyond middle school, most students are not involved in any music instruction at all unless a student elects to continue taking music classes. The music performance training provided during elementary and secondary education rarely includes new digital medias or contemporary culture.

Challenges Facing the Future of Classical Music and Music Education

The average student in the Western world has evolved; diversity has increased in schools and the world has become more globally focused with increased access to technology (Glenn, 1990). As our society has grown and developed over time, our music education system has not

evolved to meet the changing needs of the communities it serves. Increased student diversity, many different popular genres of music, and new developments in technology have not been factored into how our education system teaches music. According to Williams (2007), "The number of students who drop out of performance courses has been shown to be in the neighborhood of 50 percent" (p. 20). If the music education system does not begin to embrace new trends in music and education, then it will face increasing funding cuts and a crisis of irrelevancy (Reimer, 2004).

Technological Advancements

The recent developments in technology have revolutionized the world as well as contemporary culture, making interaction with music more complex (Williams, 2007). Due to increased access to multimedia technology through portable digital devices, culture has shifted to become more participation driven, allowing traditional "audience" members to have more control over the content being consumed (Jenkins, 2009). Anyone with access to the internet can download and play music in ways that were not imaginable 25 years ago. Additionally, computer software programs like Finale, Sibelius, and ProTools, (as well as similar, free programs available online) have increased students' ability to create and manipulate music. Increased speed and access mean that the study of rhythm, harmony, tone color, and form should no longer be isolated (Vincent & Merrion, 1996). Williams (2007) writes, "Students can now do more musically at home without us than they can at school with us" (p. 21). Although school and extracurricular music programs still offer the main source of instruction on playing orchestral instruments. These developments have resulted in a "total theatre", where the roles of the composer, the performer, and the audience overlap significantly (Vincent & Merrion, 1996).

However, our music education programs are still primarily focused on the performer, and not the

composer or audience. Our culture as a whole has become increasingly participatory, but these

new developments are not yet reflected in music education programs.

Diversity and Cultural Relevance

Orchestral programs at every level have traditionally served only a small portion of their

community. Historically, members of professional, community, and youth orchestras were

socially and financially privileged, and were often only white males in early decades of the

movement (Avshalomov, 1979). There is still a lack of diversity in contemporary orchestral

organizations.[1] At the time of Clements' article, only two percent (two individuals out of 100) of

the Boston Symphony Orchestra was African-American, with other percentages made up of

White and Asian musicians (Clements, 2006). Clements continues, "This percentage is typical

of most American symphony orchestras, and does not reflect the ethnic makeup of the

metropolitan community. The lack of ethnic diversity in classical music orchestras extends to

other art areas as well. As far back as the late eighties articles a lack of ethnic diversity in the

ranks of performers and audiences in New York arts organizations has been noted [sic]" (p. 52).

These issues are still such a problem today because few minority instrumentalists are even

auditioning for orchestras. Existing structures for music education are not widely accessible to a

diverse range of students, so programs are not training a diverse range of applicants for classical

music performance jobs.

If these youth orchestras and music education programs generally continue to only draw

students from a small section of the population, orchestras will continue to reflect only part of

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[1] Diversity in this context is primarily used to refer to ethnicity and socio-economic background.

their respective community populations and will continue to lose audiences and community

support. Further, if the field does not evolve along with contemporary technological

advancements, it will further compound a lack of relevancy. Unfortunately, these problems

facing the field are not new. A quote from the 1967 National Association for Music Education

(MENC) "Code of Ethics" said it best: "The school program will suffer without community

support and the youth orchestra will die for lack of members if the school music program

withers" (p. 129). Classical music and music education need to adapt to the changing cultural

landscape in order to plan for long-term sustainability.

Sustainable Funding

Despite the recognized values of arts education, United States federal funding for the arts

and arts education is extremely vulnerable and in constant decline. Riley II (1994) explains this

situation as follows, "Almost as soon as 'the arts' are mentioned these days, some remark about a

crisis of funding is soon to follow. Despite healthy attendance at museums and performances,

most of the financial figures posted in the past two years by arts organizations of all sizes

worldwide show the economic basis of the arts in a dramatic downward spiral" (p. viii). The

'culture wars' in the United States that surrounded the 1989 Corcoran Gallery of Art exhibition

of Robert Mapplethorpe's photography reignited the debate around the importance of the arts.

Cummings (1991) writes, "The bruising political battles of 1989 and 1990 underscored how

fragile and potentially tempestuous the relationship between government and the arts can be" (p.

75). Funding for the National Endowment for the Arts has stagnated and has been increasingly

hard to secure with strong partisan opposition in the United States government, who often make

the argument that other social issues should be prioritized over the arts. In the 1990s, Europe

also felt the crush of economic recession, and England and Germany made significant cuts in funding to their arts institutions (Riley II, 1994).

In the realm of arts education, the arts are often the first item cut from the budget when schools face economic crises. The trend toward standardized testing has continued to narrow the educational focus to 'core curriculum' subjects like math, language, history, and science. The strong tradition of private support for the arts and arts education has worked to fill the gap left by cuts to federal spending on the arts, providing supplement arts programming in and after school usually run by nonprofit organizations. Wolf and Burger (1991) write, "it is clear that acting in concert with other organizations, public schools can deliver strong and innovative arts education" (p. 144-145). But is important to note that the field of nonprofit organizations in the United States is facing a crisis, with an oversaturation of organizations and an exhaustion of traditional models for funding.

New Trends in Music Education

In order to allow shifts in education, changes will need to be made to educational policy and teacher education (Colwell & Rodriguez, 2002). As the state of music education currently stands, it does not reach the entire student population. As a result, music educators have advocated other beneficial outcomes to performance courses in addition to nationalized educational standards. Some of these benefits include improved performance in reading and math, development of critical and creative thinking skills, improved communication skills, or increased self-esteem and self-discipline. Howard Gardner (1999) has introduced the theory of multiple intelligences, which is a precursor to the twenty-first century skills and student-driven

learning environments movement. The recent educational movement called "twenty-first century skills" tries to address the needs of a student in contemporary culture, and music and the arts are often touted as great purveyors of "twenty-first century workforce skills" like critical thinking, problem solving, communication, collaboration, creativity, and innovation (Partnership for 21st Century Skills, 2013). Although arts experiences have proven to have myriad individual and social benefits, there is danger in using the arts to advocate for other social benefits. Many have argued that using the arts to advocate for additional social benefits gradually diminishes the strength and cultural value of the arts themselves. Reimer (2004) writes, "We must advocate so furiously because we are selling what so few care to buy" (p. 34). Cultural irrelevancy forces the arts advocates to rely on other supplemental social benefits.

Music educators and music education researchers have been writing about these issues for years, agreeing that student populations will continue to become diverse (Grant & Kohut, 1992) and technology will continue to develop and allow increased interaction with music (Williams, 2007). In 1990 Glenn wrote, "In order to provide a musical education that all students find interesting, valid, and meaningful… the music education profession will need to expand the definition of multicultural education" (p. 21). While little coordinated progress has been made to incorporate new technologies, music education programs have worked to incorporate diversity in both curriculum and community representation. In their article *Performance Teachers for the Future,* Grant and Kohut (1992) outline the four most common approaches to incorporating diversity into existing programs. First, music programs need to include more ethnically representative groups. Instead of only having a band and orchestra, schools should strive to create groups that reflect their population's specific ethnicities. Second,

music teachers should extend the repertoire of their existing groups to be more culturally diverse

and include a mixture of traditional and contemporary music. Music beyond the Western

classical tradition should be included in the curriculum and repertoire of large performing

ensembles, and teachers should try to include the music of the cultures directly represented in

their class. Third, music programs should incorporate more opportunities for creativity and

improvisation. Teachers should include instruction on composition and improvisation, not just

jazz improvisation, along with traditional reading and performing previously written music.

Finally, secondary music education should become more accessible by including opportunities

beyond large performing ensembles. Programs need to include the cultural context of new music

as well as performing, composing, and improvising opportunities.

As early as 1982, organizations began addressing these issues of diversity in the

orchestral community by identifying and training minority students who do not have ready

access to music education. One of the first organizations was Boston's String Training and

Education Program, or STEP, which was spearheaded by the Boston Symphony Orchestra and

developed to address the under representation of Blacks and Latinos in the classical music

profession. Another successful outreach program, the Sphinx Organization was founded in

1996. This Chicago-based nonprofit has a symphony of all Black and Latino members, as well

as a summer academy, string quartet, string competition, and 'musical encounters' program. In

1992, the Dallas Symphony founded the free of charge Young Strings, which discovers,

develops, and promotes the musical talent for over 2000 Black and Latino string players in the

Dallas area (Dallas Symphony Orchestra, 2011). In 2000, the previously established Boston

Youth Symphony Orchestra, housed at Boston University, launched their Intensive Community

Program. This program provides string instrument instruction to students of under-represented

communities beginning in first and second grade. In 2006, the organization had successfully

trained eighteen students to enter their regular youth orchestra programming (Clements, 2006).

Clements outlined key factors for success across these various programs, which include parental

involvement, high standard of excellence, community building within the programs, and

association with a well-established youth orchestra.

Conclusions

As Vincent and Merrion (1996) write, "Listening will be an enduring skill, but it will be

an evolving skill" (p. 39). It is important that the fields of classical music and music education

continue to evolve along with the changing needs of the communities they serve. Professional

orchestras will continue to lose audience members and threaten further cuts and closures if the

organizations do not meet the needs of their increasingly diverse and global communities. A few

programs have begun to address the issues of diversity in and accessibility to classical music

organizations through youth orchestra outreach programs to minority students, most notably El

Sistema. Programs need to embrace increased diversity, emergent technologies, and the

contemporary music culture. The Sistema program model offers a unique solution to many of

these issues. Booth (2009) describes their approach, writing "Art for art's sake? Art for the sake

of developing life skills? In America we feel these goals are somehow at odds. In *El Sistema*

they are completely intertwined; and the teachers, who are all really teaching artists given the

complexity of their roles and goals, lead a program that students don't happen to notice is about

art or changing their lives because is simply feels like the greatest way to have fun" (p. 80). It

offers a fresh perspective for the field.

Part Two: Development of El Sistema

Introduction and Background

One of the primary arguments behind cutting budgets for the arts and arts education is that there are more pressing social issues that should be prioritized. Riley II (1994) explains, "It would be a serious political mistake for any world leader at the present time to say that culture assumes first priority among government matters. Economic and military problems continue to preoccupy the upper echelons of governments, while art remains on the back burner until these more pressing matters can be brought under control" (p. viii). Despite this, El Sistema is turning that idea upside down by arguing a robust cultural policy can actually be the solution to many of the most pressing social problems that governments face.

In his article "The Public Policy Roots of Music Education History," Michael Mark (1999) writes, "The roots of music education historical trends and events are usually found in societal conditions that create certain needs of the public, or of particular groups within a society" (p. 103). During the history of music education, several educational models have risen to meet the broader needs of the music education community and have been recognized and implemented on an international level, including the Dalcroze, Kodaly, Orff-Schulwerk, and Suzuki methods (McCarthy & Goble, 2011). However, these movements did not address the underlying social problems facing the music students and their communities. Although the El Sistema program looks like a traditional orchestral music education program, it is primarily described as a social and community development program. It works to affect social change by striving to meet to dual goals of musical excellence and community development. Abreu chose the orchestra, or large musical ensemble, as the vehicle for community development because he

believes "it is the only community that comes together with the fundamental objective of

agreeing with itself. Therefore the person who plays in an orchestra begins to live the experience

of agreement" (Quote transcribed from Arvelo, 1996). A core tenant of the program is the belief

that the skills needed to be a good orchestra member are the same skills needed to be a good

community member.

During the 1970s, El Sistema was independently founded by economist, musician, and

politician José Antonio Abreu and became a federally funded program due to a unique alignment

of Venezuelan social policy goals and federal resources. The program is blazing a new model of

government support of the arts under the umbrella of social, not cultural, policy. This new

program model piloted and championed by El Sistema addresses many of the issues facing the

classical music and music education fields, including funding, cultural relevance, diversity, and

sustainability while also working to affect broader social change. There are further implications

for other social and community development programs, initiatives using art and social change,

and other relevant fields.

History of El Sistema

El Sistema is the common name for the National Network of Youth and Children's

Orchestras of Venezuela, called *La Fundación del Estado para el Sistema Nacional de las*

Orquestas Juveniles e Infantiles de Venezuela or the acronym FESNOJIV (fes-no-hiv) in

Spanish. Recently, the name of this organization changed to *Fundación Musical Simón Bolívar*

(FMSB) although it is still widely known by the FESNOJIV acronym (Tunstall, 2012). FMSB,

also called FundaMusical Bolívar, is a social and community development program that uses the collective practice of music, primarily in a classical orchestra setting, to affect social change.

In 1975, José Antonio Abreu founded a youth orchestra that grew to become the Simón Bolívar Symphonic Youth Orchestra. In 1977, the orchestra and affiliated foundation became a publically funded program of the Venezuela's Ministry of Family Services. FMSB is specifically designed to exist as a program of the Ministry of Youth, not the Ministry of Culture. When launching the first program, Abreu felt that the Ministries of Culture in Latin America upheld an elitist idea of art with limited access. In an interview with Tricia Tunstall (Tunstall, 2012), Abreu said, "To me, an orchestra is first and foremost a way to encourage better human development within children… this is not an artistic program but a human development program through music. It is very important to be clear about this. Because everything… has been a direct consequence of this concept" (p. 71). With the implementation of El Sistema, music instruction for over 250,000 Venezuelan children begins at age three and is free for all participants at local community music centers called *núcleos*. These centers are often reclaimed from abandoned or unused spaces and buildings. Participants attend rehearsals, sectionals, and lessons up to six days a week, four hours a day with performances usually taking place each Sunday. The high intensity of this program is designed to keep young participants off of the streets and away from potentially dangerous or delinquent activity during high-risk times of the day, especially afterschool and on the weekends. The program also works closely with parents to build support for students and gives students monetary stipends when they successfully audition into a youth or civic orchestra.

El Sistema has grown from the first program and now refers to a tiered network of youth

orchestras at local *núcleos,* affiliated schools of music and training programs, a conservatory in

Caracas, and a diverse funding structure that includes the Venezuelan government, private

foundations, the Inter-American Development Bank (IADB), and many more. In 1997, the

IADB granted the Republic of Venezuela $8 million in matching funds as part of a $16 million

package to consolidate the national systems of orchestras and choirs through investment and

institutional strengthening. The grant helped to fund the Center for Social Action through Music

in Caracas as well as strengthen the newly unified network both academically and financially

(Inter-American Development Bank, 2013). Participants of both orchestras and choirs – many of

whom live in poverty – attend rehearsals, sectionals, and lessons 24 hours per week. *Núcleos*

now exist in every Venezuelan state, which serve as satellites to the Center for Social Action

through Music, which now serves as the headquarters of Venezuela's El Sistema (Hollinger,

2006). Hollinger writes, "Every state is meant to have at least one primary orchestra site, which

consists of a professional orchestra, a youth orchestra, and a children's orchestra. Most sites also

have choirs. Students sing, learn solfege and basic music theory, take private and group lessons,

and participate in one orchestra" (p. 85). Although the program focuses on developing good

citizens, many graduates have gone on to great musical success. Two wonderful examples of the

program's musical excellence and success is Gustavo Dudamel, who began studying violin

through El Sistema and now conducts the Los Angeles Philharmonic, and Edicson Ruiz, a bassist

who became the youngest member of the Berlin Philharmonic at age 17. Over time, the system

has worked to develop programs that mainstream students with developmental and learning

disabilities (Booth, 2009). In the documentary *Tocar y Luchar*, director of the FMSB special

education division Johnny Gomez stated that "The main objective of the special education program is to incorporate children with special needs, children who are visually impaired, hearing impaired, movement impaired, with learning difficulties, autism, cognitive deficits, and integrate them into society through music. Initially no one could understand how a deaf person could make music in a Conservatory, within the Venezuelan Youth and Children's Orchestra System. We have broken that paradigm, that to study music one must have good hearing" (Quote transcribed from Arvelo, 2006). El Sistema has also strategically expanded to included a network of instrument makers, instrument repair shops, traditional folk music ensembles, ensembles for prison inmates, and more.

Venezuelan Cultural and Political Development

Venezuela's post-independence politics began in the early nineteenth century. Revolutionary Simón Bolívar's general José Antonio Paez led Venezuela's separation from Gran Columbia in 1829, forming an oligarchic democracy that lasted for sixteen years. But when coffee prices dropped in the 1840s, the country spiraled into a cycle of regional struggles for political predominance (Blake, 2008). The second half of the nineteenth century and into the twentieth century was dominated by a series of *caudillo* dictatorships, most prominently including Antonio Guzmán Blanco (1870-1888) and Juan Vicente Gómez. After successfully leading a coup in 1908, Gómez ruled Venezuela until his death in 1935, bringing the country into the twentieth century with large state building and economic development projects (Vanden & Prevost, 2011).

In the mid-1940s, there was a three-year period of significant political and economic reform called *Trienio*. Between 1945 and 1948, a two-party political system emerged that eventually established the Christian Democratic Party (known by their acronym COPEI) to counterbalance the previously established Democratic Action Party (AD). Despite these reforms, Marcos Pérez Jiménez successfully led a bloodless coup in 1948 that made him a dictator through 1958. After military pressure led him to flee the country, the two-party democracy began to stabilize. COPEI and AD signed the 1958 Pact of Punto Fijo, which built a pattern of moderation, cooperation, and power sharing between the two parties (Blake, 2008). By the 1970s, Venezuela was a model democracy that launched numerous state-led development plans. In 1971, Venezuela was the only democratic member of the Organization of Oil Exporting Countries (OPEC). It was during this time that El Sistema was founded and initially funded by the Venezuela's government. However, Venezuela was unable to escape the economic strain of Latin America's "Lost Decade" during the 1980s and even into the 1990s. The world recession and a drop in oil prices stagnated the economy. By the late 1980s, citizens were calling to AD and COPEI for changes in policy to address the ongoing economic crises.

For Venezuela, this change came in the form of young paratrooper Hugo Chavez, who led a failed coup and gained national recognition in 1992. After campaigning on the platform of reform, Chavez won the presidential election in 1998 and was granted temporary decree powers in 1999 to revise the constitution. The large majority of representatives at the following National Constituent Assembly – the constitutional convention – were from the Patriotic Pole, Chavez's new political party. Blake (2008) writes, "Chavez's supporters thus controlled the creation of the revised constitution that frames contemporary political life" (p. 373). The result was a

progressive constitution that expanded indigenous rights, used gender-neutral language, and created a fourth 'citizen's' branch of government. The new constitution also reduced the power of political parties, ending the dominance of AD and COPEI in favor of a Chavez's party, and provided new mechanisms for direct democracy.

When discussing the development of Venezuela, the importance of oil – and thus economics – cannot be disregarded. Venezuela controls the seventh largest oil reserves on our planet, and the largest oil reserves in Latin America. After his election, Chavez worked to reform the oil sector by cutting back on production and raising prices. The major business confederation in Venezuela, the Federation of Chambers and Associations of Commerce and Production (FEDECAMARAS), formed in 1944 and now represents nearly all sectors of the country's economy (Blake, 2008). FEDECAMARAS, along with the largest labor union the Confederation of Venezuelan Workers (CTV), have fiercely opposed the reforms of the Chavez government that jeopardize traditional profit structures. In response, Chavez organized new social movements to support his presidency. In 2002, a two-month oil industry strike resulted in a brief coup against Chavez, during which the president of FEDECAMARAS Rafael Caldera served as interim president. Citizens of Venezuela demanded the return of Chavez after Caldera threw out the 1999 constitution, dissolved the National Assembly, and dismissed all sitting justices on the Supreme Tribunal of Justice. Chavez was allowed to return as president, with a new mandate for his reform policies. By 2005, Chavez's political party, now called the Fifth Republic Movement (MVR), controlled all seats in the National Assembly. After winning re-election in 2006, Chavez and his supporters, called *chavistas*, continued to consolidate power and push social reform policies. All political parties were consolidated with MVR to create the

United Socialist Party of Venezuela. Despite this single party, Venezuelan politics remain deeply divided into *chavista* and anti-*chavista* polarities.

An underlying theoretic philosophy that Chavez called "socialism for the twenty-first century" or "Bolívarianism" drove his social and political reforms. This philosophy is driven by the revolutionary ideals of both Bolívar as well as Marxism, filtered through Chavez's lens of social inclusion. Vanden and Prevost (2011) write that Chavez affirmed "the principle that economic policy making prioritize the needs of those threatened with exclusion from the social benefits of oil income and vulnerable to the impersonal forces of capitalist globalization" (p. 499). One example of Chavez's Bolívarianism is his program of Bolívarian Missions, which are a series of social justice, social welfare, educational, anti-poverty, and military recruitment programs funded by the Venezuelan Office of the President. The Missions use large revenues generated by oil production to directly fund anti-poverty programs, construct medical clinics, subsidize food and housing, and small manufacturing cooperatives. Chavez designed these programs as alternatives to traditional systems of education, health care, and housing to show program beneficiaries that resources and support came directly from him. It is important to note that in 2010, oversight of FundaMusical Bolívar was moved from the social service ministries to Venezuela's Ministry of the Office of the President, when Chavez incorporated it into a new cultural Bolívarian Mission for music.

In 2013, Chavez died in office after a two-year battle with cancer. Over the course of his presidency, Chavez used a cult of personality to consolidate his own power while weakening other governmental institutions, leaving the Office of the President as the most powerful and highly functioning arm of the Venezuelan government. A month after his death, presidential

elections were held in a highly polarized Venezuela between Chavez's chosen successor Nicolás

Maduro and opposition leader Henrique Capriles. Maduro won the highly contested elections by

1.5% of the vote, which is being independently audited after anti-*chavista* protesters

demonstrated across the country. Although Maduro was sworn in on April 19, 2013 it remains to

be seen how he will address the deeply polarized country and maintain control of the now

singularly influential presidential office.

Effects of the Chavez Presidency

During the Chavez presidency, income inequality in Venezuela gradually declined and

the country gained the fairest income distribution in Latin America at 0.39 by the Gini

coefficient. At the same time Venezuela – the fifth largest economy in Latin America – has been

the worst performing in GDP growth per capita (Plummer, 2012). The long-term effects of

Chavez's presidency have yet to play out, and will depend on shifting interpretations of social

progress goals. It will remain to be seen if Maduro and the United Socialist Party of Venezuela

can continue Chavez's social platform while keeping the economy stable. The strong cult of

personality that helped Chavez rise to and stay in power has not been developed in any of his

supporters or in new president Maduro. Blake (2008) writes, "Regardless of one's ideological

perspective and economic policy preferences, there is no denying that Hugo Chavez has led a

transformation in Venezuelan politics. For some, his leadership constituted the most viable path

toward a more inclusive political and economic system. For others, his tactics represented an

erosion of democracy" (p. 363). As this project was conducted, Venezuela continued to face

increasing violence, skyrocketing inflation, and mass shortages of goods like toilet paper, milk,

bread, and even sacrificial wine. In the first five months of 2013 alone, inflation of the Venezuelan Bolívar reached 27.3% according to the International Monetary Fund (Rapoza, 2013).

Many believe that contemporary Venezuelan politics have effectively become characterized by praetorianism, rendering the country nearly ungovernable. *Praetorianism* refers to political systems where armed forces influence government decisions through the threat or use of force. This term was later broadened to include any groups – military or civilian – that use coercion to influence formal political processes (Huntington, 1968). Huntington writes, "In all societies specialized social groups engage in politics. What makes such groups seem more 'politicized' in a praetorian society is the absence of effective political institutions capable of mediating, refining, and moderating group political action… Equally important, no agreement exists among the groups as to the legitimate and authoritative methods for resolving conflicts" (p. 196). If this is assessment is true, Venezuela faces significant challenges. Continuing dependence on the oil sector makes the economy vulnerable to price swings on the world market and the deep political polarization of *chavistas* and anti-*chavistas* further threaten the stability of Venezuela's political system and the country as a whole.

Growth of El Sistema

Long before Chavez came to office and reformed Venezuelan politics, El Sistema was reforming the world of classical music. The system has grown beyond the borders of FundaMusical Bolívar and Venezuela. El Sistema has inspired other national youth orchestra systems in most of Venezuela's neighboring Latin American and several Caribbean countries.

During the course of this study, the Sistema movement spread to Belize with the announcement

of a new national program network in development. Especially robust networks of El Sistema

inspired programs have grown over the last 20 years in Argentina, Brazil, Columbia, and

Mexico. Regional support network Iberorquestas has also grown to meet the needs of the robust

field of El Sistema inspired programs across Latin America.

A leading example of the regional growth of El Sistema inspired programs is Columbia's

El Sistema inspired network, called Batuta (Spanish for "baton"). It was launched over 20 years

ago with the help of José Antonio Abreu to face similar social challenges El Sistema works to

meet in Venezuela. It has developed into a robust network initially focused on early childhood

education, but recently expanded to more include more youth orchestras and youth-aged

programming. Batuta is largest network of El Sistema inspired programs, second in size only to

the original Venezuelan network (Booth & Tunstall, 2011). A few key differences exist between

the two programs, including a mixture of public and private funding as well as a more developed

existing infrastructure for classical music in Columbia. Batuta is also noted for its focus on

teacher training, and runs four ongoing regional training programs for teaching in the Sistema

program model. According to Executive President of Batuta Juan Antonio Cuellar (Booth &

Tunstall, 2011), the program focuses on three main elements of teaching, "One is improvement:

are your students improving artistically, all the time? Two is engagement: Are your students

engaged? Are their families engaged, and are their communities engaged? Three is ethics: are

you adhering fully to the highest code of ethics, following the UNESCO Rights of Children

code? And are you modeling for these students everything you want them to become? This

includes artist, teacher, learner, experimenter, and socially responsible adult" (p. 5). The

program sees teacher training as an investment in the future, and has many lessons and best

practices to share in addition to Venezuela's inspirational program model and network. Batuta

also serves as an example of the highly successful lateral program growth that has taken place in

Latin America over the last several decades, with El Sistema inspired programs in nearly all

Latin American countries.

The rich network of nonprofit arts organizations and private funding for the arts available

in the United States has allowed the United States to lead the international growth of the global

Sistema field beyond the Latin American region. El Sistema USA, an organization supporting El

Sistema inspired programs in the United States, was founded in 2009 with start-up support from

the New England Conservatory (NEC). Also in 2009, El Sistema Founder Abreu was awarded a

TED Prize, given to extraordinary individuals with creative and bold visions to spark global

change. The $100,000 prize supports a wish to inspire the world, which Abreu used to fund the

Abreu Fellowship (now called the Sistema Fellowship), a tuition-free training program housed

by the New England Conservatory for postgraduate musicians (Ted Conferences, LLC, 2013).

The Sistema Fellows Program is a professional training program designed to educate emerging

leaders in the El Sistema field, who can go on to lead, teach, and build capacity in El Sistema

inspired programs around the world. More recently, the Los Angeles Philharmonic partnered

with the Longy School of Music of Bard College to launch the Take A Stand initiative, which

offers an accredited Master's of Arts in Teaching (MAT) program based in Sistema inspired

methodology. It is hoped that this program will be a pipeline of El Sistema-trained instructors

(Edgers, 2011). And in 2012, the University of Maryland Baltimore County (UMBC) partnered

with the Baltimore Symphony Orchestra (BSO) to develop a one-year post-baccalaureate

certificate program in Music Entrepreneurship, also working to train future Sistema program

leaders. Also in 2012, a group of volunteer nonprofit administrators and Sistema inspired

program leaders came together to build the National Alliance of El Sistema Inspired Programs

(NAESIP) in the United States, which voted on bylaws and elected an initial board in early 2013.

This dues paying professional organization has diverse membership of more than 40 El Sistema

inspired programs in the United States. NAESIP hopes to leverage advocacy and support for the

U.S. Sistema inspired field.

Beyond the United States and the original program in Venezuela, there are a few

programs supporting the growth of El Sistema around the world. FMSB supports international

growth as much as capacity allows and tracks some international programs with links on their

website. Sistema Europe holds quarterly member gatherings and maintains a list of programs in

the European Union and the Middle East on their website. Beyond these lists and a growing

number of news articles reporting on specific programs, there is no publically available, peer-

reviewed information on the international El Sistema inspired movement.

Throughout the growth of the movement, several transnational organizations have

supported the growth of the Sistema inspired field. In November 1995, Abreu was appointed a

UNESCO Special Delegate for the development of a world system of youth and children's

orchestras and choirs (FMSB, 2012). In 1982, Abreu also received funding from UNESCO to

host a world-renowned luthier (instrument maker), who helped develop the network of

instrument making and repair programs that now support El Sistema (Booth, 2009). And in the

past ten years, international policy-makers and educators have begun updating educational policy

with arts education in mind. UNESCO now believes education in the twenty-first century will

have to rely on arts education, which helps students adapt and embrace the challenges and

changes needed to make learning successful (Aspin, 2001). UNESCO has also recently begun to

host world conferences and other gatherings for arts education initiatives and professionals.

Other notable transnational organizations that support El Sistema on an international

level include the Iberorquestas and the International Society for Music Education (ISME).

Iberorquestas is a multi-national initiative including the fourteen Latin American and Caribbean

nations of Argentina, Brazil, Columbia, Costa Rica, Dominican Republic, Ecuador, El Salvador,

Spain, Guatemala, Haiti, Mexico, Panama, Uruguay, and Venezuela. It promotes the musical

development of children and youth of medium and small resources in situations of social risk

(Iberorquestas, 2013). The ISME maintains a Research Sub-Group on El Sistema, convened by

Theodora Stathopoulos of Canada and Greece and advocated by Richard Hallam of England and

Graca Mota of Portugal, which had to be ratified by fourteen member countries.   They produce

regular newsletters on El Sistema related research and activities. Many other groups like these

are also in development, and will continue to form to meet the growing needs of the emerging

international El Sistema field.

Future of El Sistema

The social reforms that Chavez implemented are primarily supported through the Office

of the President. Other established social development programs, like El Sistema, were also

absorbed into the President's Office to increase both funding and visibility as part of Chavez'

Bolívarian Missions. When Chavez passed away, there was some concern about the long-term

stability of programs supported by myriad future presidents, although current president Maduro

has ended initial concerns by supporting the vast expansion of El Sistema in Venezuela.

In January, as part of the inaugural activities that Chavez missed due to his health, Abreu,

Dudamel and the top FMSB orchestra offered a concert to Chavez's health. Abreu expressed his

solidarity with Chavez while former Vice President and newly elected President Maduro

promised to continue expanding El Sistema (Baker, 2013). Baker goes on to write, "This

enthusiastic display of support for Chavez, right down to the insertion of the word

'revolutionary,' was too much for many from the other side of the political spectrum" (p. 1,

online). At the same time, *chavistas* were criticizing Abreu for meeting with Venezuelan

musicians critical of Chavez's presidency. Even more prominently, Dudamel conducted the

same orchestra at Chavez's funeral in March 2013. After years of delicately walking the

political line in Venezuela, El Sistema's founder Abreu has made two very public and very

political gestures supporting Chavez during his last days. According to Baker (2013), these

behaviors reveal dealing between El Sistema and the government where public support is traded

for program funding and support.

As one of his last acts as president, Chavez appointed a government administrator to

ensure leadership for El Sistema movement forward. This person is supposed to act as liaison

between the government and the program, to facilitate the needs of El Sistema. Additionally, El

Sistema's budget and loans for capital projects are allocated in US dollars, offering a certain

level of financial stability in relation to the world market. But the recent devaluation of the

Venezuelan Bolívar had made everything beyond their borders – like musical instruments and

plane tickets – exponentially more costly (Govias, 2013). Govias writes, "Sistema has outlasted

its eighth political administration and is now into its ninth with Maduro's interim tenure,

however constitutional the latter may be. The question is whether the Fundación will remain

unscathed through to an eleventh or twelfth" (p. 1, online).

The program has only continued to grow. In May 2013, President Maduro met with

Abreu to discuss expanding the program. According to Pearson (2013), "They agreed on a

project called Musical Program Simón Bolívar, which will aim to have one million Venezuelan

youth and children playing musical instruments." Expansion plans aim to increase access to the

program, with the goal of one million students to be achieved in stages. The program now forms

part of a macro federal project working to combat crime and violence, called the Movement for

Peace and Life (Pearson, 2013).

Conclusions

Regardless of the uncertainty facing Venezuela and thus El Sistema's continued

development, the program model will continue to inspire diverse applications across both

cultural and community development fields. The recent boom of El Sistema inspired programs

around the world is a testament to the broad applicability and popularity of the Sistema program

model. By making the argument that music and the arts can be used to address broad social and

community issues, the new model opens up access to funding beyond the traditional cultural

sources that continue to contract in the contemporary economic environment.

Chapter Four | Research Findings and Analysis

Introduction

This research project utilized a multi-level approach to develop a holistic view of the emerging field of El Sistema inspired programs while also working to identify the needs of the growing movement. The qualitative data were gathered through a two-tiered, bilingual questionnaire and semi-structured interviews with key informants, selected due to their strategic leadership within the global Sistema movement. By identifying the key elements and needs of the field, this research intends to contribute strategic information to help support emerging El Sistema inspired programs around the globe. The inquiry reported on in this chapter was informed by the review of literature and further developed by triangulating data collected via questionnaires and interviews.

Data Collection

Two questionnaires, one in English and one in Spanish, were built using research enterprise software Qualtrics, made available by the University of Oregon. Links to the questionnaires were hosted on a free Wordpress blog built for the project, along with bilingual text that explained the nature of the project and contextual information about El Sistema. The project blog is still available online at http://globalizingelsistema.wordpress.com/. Links to the blog and to the English and Spanish questionnaires were distributed by several of the key informants through the existing communications infrastructure serving the El Sistema field, including the Sistema Global LinkedIn group, the ISME El Sistema Research Subgroup listserv,

and the Sistema Europe listserv (maintained by Glenn Thomas, Richard Hallam, and Marshall

Marcus respectively). The blog was viewed over 500 times around the globe, and 18 El Sistema

inspired programs completed the questionnaire. Two of those questionnaires were submitted in

Spanish.

Key informants for the interviews were selected through demonstrated strategic

contributions to the field, such as the facilitation of a Sistema network or regular publications on

the topic of El Sistema. The ten leaders who participated in the study represent a broad range of

programs, geography, perspectives, and understanding of the El Sistema movement. Interview

questions (See Appendix F) focused on participant's perceptions of the El Sistema field in

general, their experience within the field, their observations of growth, and their thoughts on

resources both available and needed within the movement. The interviews were conducted via

telephone and Skype over a three-month period, and were recorded for referential accuracy.

Project Blog Map

A map generated by the Globalizing El Sistema project blog hosted on Wordpress

revealed an interesting view of the field. The site analytics dashboard automatically generates

maps that reflect the location of a computer that viewed the blog via the internet. It is possible to

limit the map view by day or week, in order to track web traffic on the blog.

Surprisingly, the spread and intensity of site visits for this project closely mirrored

international El Sistema inspired program growth, as illustrated in the image below. The map

depicts the site visits during the entire data collection period, from February through April 2013.

The most site visits came from the United States with 371 unique visits, depicted by the color red

on the map. Gradients of orange represent other levels of site visit frequency.
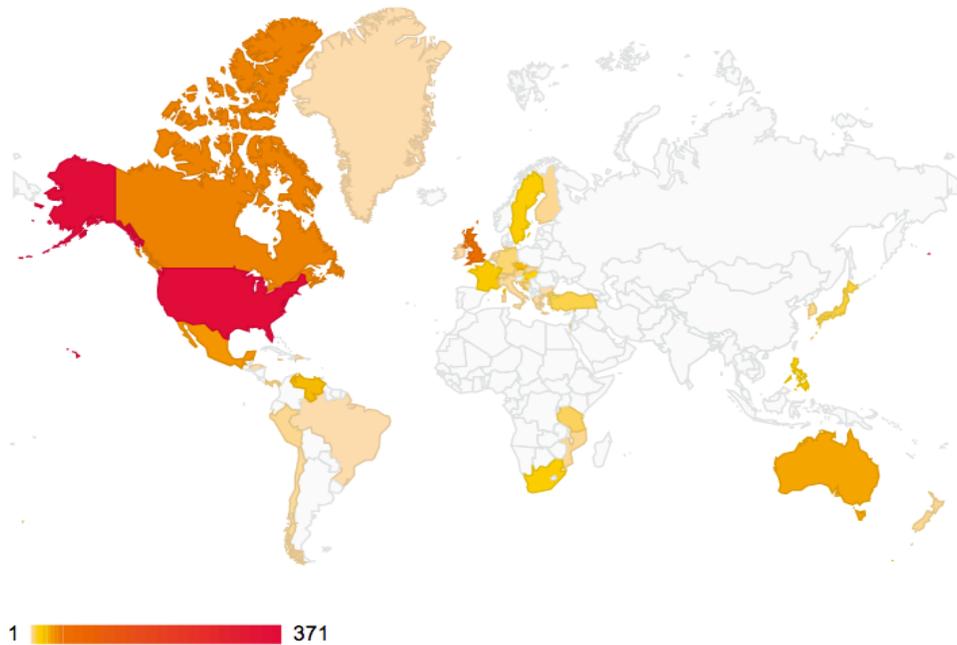
Figure 1. Geographic map of http://globalizingelsistema.wordpress.com/ site visits during the data
collection period of this study, February – April 2013.

Questionnaire Sample

Eighteen different El Sistema inspired programs from around the world filled out the

study questionnaire, representing three regions or five subregions of the United Nations

geoscheme. Programs included ten from the Americas – three from Latin America and the

Caribbean along with seven programs from North America; five from Eurasia – three programs

from Europe and two programs from Asia; and three programs from the Oceania region,

including two from Australia and one from New Zealand. See Appendix G for a full list of programs that participated in this study.

The first program from Latin America to complete the questionnaire was El Sistema – Mexico, the network for El Sistema inspired programs in Mexico. This organization was founded in 1989 and now serves nearly 50,000 students at multiple sites throughout the country. Funding comes from the government at all levels (federal, regional, and state), non-government organizations (NGOs), and foundations. An emerging El Sistema inspired program from Mexico also completed the questionnaire, A Tocar Mazatlan. This program was founded in 2012 and currently serves 32 students with support from the municipal government. The final Latin American program was the *Fundación Sinfonia Concertante de Panama*, which has been established since 2008. This program serves 200 students with support from schools, NGOs, and both universities and conservatories along with funding from the federal government, banks, and private donors. El Sistema – Mexico and *Fundación Sinfonia Concertante de Panama* have both signed friendship agreements with FMSB.

North America has seen the most growth of El Sistema inspired programs and represents the largest block of participants in this study, including one from Canada and six from the United States. Sistema New Brunswick was founded in 2009 and serves 400 students with support from the provincial government, foundations, individual donors, and business sponsorships. The Canadian program is supported by Sistema Canada as well as school districts, non-government organizations (NGOs), and foundations. The six United States programs who completed questionnaires include The YOURS Project of El Sistema Chicago, founded in 2008 and serving over 200 students; Jump Start Strings of the Jacksonville Symphony Association, founded in

2009 and serving 100 students; Kalikolehua of El Sistema Hawai'i, founded in 2010 and serving

70 students; Josiah Quincy School Orchestra Program in Boston, founded in 2011 and serving 68

students; Progressions Project of San Jose Jazz, founded in 2011 and serving 160 students; and

Play On, Philly!, founding in 2009 and serving 240 students. The U.S. programs are able to

conduct programming with support from corporate and philanthropic foundations, municipal

governments (usually through Departments of Education) and school districts, NGOs,

professional orchestras, and individual donors. The Josiah Quincy School Orchestra Program is

the only participant of this study that supports programming with student participation fees. The

programs that have been founded by alumni of the Sistema Fellowship Program (The YOURS

Project, Josiah Quincy School Orchestra Program, and Play On, Philly!) are in direct contact

with FMSB and have been hosted on several learning trips to Venezuela.

European programs are primarily distinguished from their North American counterparts

by their government-based support. The first European program to complete the questionnaire

was In Harmony England, which was founding in 2012 and serves 770 students. In Harmony is

funded by the federal government of England through the Arts Council and Ministry of

Education, which allows for significantly more impact than older El Sistema inspired programs

that are not federally supported. Also participating in the study is Sistema Italia, founded in

2011 and already serving 8000 students. Sistema Italia is the network for El Sistema inspired

programs in Italy, which are funded by foundations and multiple levels of government (regional,

county, and municipal). In Harmony England and Sistema Italia have both signed friendship

agreements with FMSB. An emerging El Sistema inspired program from the Czech Republic

also participated. The Harmonie Foundation, founded in 2011 and serving 20 students at one

school site, is supported entirely by private donors at this point in development.

        The newest area of growth of El Sistema inspired programs is in Asia, which is

represented in this study by programs from Japan and the Philippines. The Friends of El Sistema

Japan, the network for El Sistema inspired program in Japan, was founded in 2012 and currently

serves 160 students in an afterschool setting and nearly 1000 students in school based music

programs. Japanese El Sistema inspired programs were founded in response to the trauma

caused by the 2012 tsunami and nuclear disaster and are supported by the federal government

through the Ministry of Education, an individual benefactor, NGOs, religious organizations, and

bank and business sponsorships. Friends of El Sistema Japan also have partnerships with FMSB

and UNESCO. Sistemang Pilipino – El Sistema for Cebu was founded just this year in 2013 and

serves 75 students. In its first year of programming, this organization is funded by their Board of

Trustees and further supplemented through benefit concerts.

        The last region represented in this study is Oceania. Two organizations from Australia

participated, included an emerging El Sistema inspired program called Bairnsdale Crashendo!,

founded in 2012 and not yet serving any students although it has initial funding from a school,

NGO, and a religious organization. Sistema Australia, the network for El Sistema inspired

programs in Australia, also participated. This network was founded in 2008 and currently serves

200 students with support from philanthropic foundations. Toi Akorangi – Sistema Whangarei is

an emerging program in New Zealand, founded this year in 2013 and already serving 26 students

with support from business sponsorships and individual donors. Diverse program partners in

New Zealand include the regional government, schools, NGOs, and a network of health

organizations.

These 18 participants have started El Sistema inspired programs to meet varied needs of

their different communities such as social exclusion, poverty and uneven social distribution,

violence, chronic unemployment, low academic achievement, high youth suicide, crime, and

domestic violence. While the programs are designed and constructed to meet the individual

needs of their communities, all are dedicated to providing social development through the

collective practice of music.

Interview Sample

Ten individuals from North American and Europe participated in an interview for this

study, representing the three English speaking countries of the United States, England, and

Canada (which also speaks French as a national language). Conversations covered the key

elements of El Sistema inspired programs, growth of the global Sistema movement, and needed

training and support for the field. Participants included:

- *Eric Booth* – Teaching Artist and Author, Senior Advisor to El Sistema USA, Co-Editor

  of The Ensemble Newsletter, Friend of the National Alliance of El Sistema Programs,

  and Coordinator of Sistema Global

- *Richard Hallam* – Director and Trustee of In Harmony Sistema England, Music

  Education Advisor to the British Government, Second Chair of the ISME Special Interest

  Group on El Sistema, Member of Sistema Europe, and Coordinator of Sistema Global

- *Stanford Thompson* – Alumni of the first class of Sistema Fellows, Founder and CEO of Play On, Philly!, and Facilitator and Board Chair of the National Alliance of El Sistema Inspired Programs

- *Tricia Tunstall* – Author of *Changing Lives: Gustavo Dudamel, El Sistema, and the Transformative Power of Music*, and Co-Editor of The Ensemble Newsletter

- *Elizabeth (Beth) Babcock* – CEO of the Women's Criterion Group, Professor of Nonprofit Strategy at The Heller School for Social Policy and Management (Brandeis), and Facilitator of the National Alliance of El Sistema Inspired Programs

- *Glenn Thomas* – Founder and Moderator of Sistema Global, Chair of Sistema Global Research Subgroup

- *Marshall Marcus* – CEO of the European Union Youth Orchestra, Founder and Chair of Sistema Europe, Founder of Sistema Africa, Trustee of In Harmony Sistema England, Sistema Global Advisory Board Member, Founder SERA Archive, Founder of *Orquesta Juvenil Barroco Simón Bolívar*

- *Mark Churchill* – Founder and Director of El Sistema USA, Dean Emeritus of New England Conservatory's Department of Preparatory and Continuing Education, and Board Member of Project STEP, Conservatory Lap Charter School, Walnut Hill School, Youth Orchestra of the Americas, and NAESIP

- *Erik Holmgren* – Director of Teacher Education and Education Initiatives at Longy's Master of Arts in Teaching (MAT) program, Former Education Director and Director of the Sistema Fellowship Program, and strategic leader of Take A Stand initiative

- *Inga Petri* – Researcher and Consultant, Facilitator of Sistema Canada

Data Analysis

After both the questionnaire and interview data were collected, information was coded to

facilitate analysis across the different channels of data collection. Updated coding included the

key elements (or mission) of El Sistema (M), growth of the movement (MG), growth of

programs (PG), program support (PS), leadership (L), resources (R), and gaps in resources (GP).

A report was generated for each participating program and for each interview. All data were

then organized into a spreadsheet that allowed questionnaire and interview data to be compared

side by side. Findings and conclusions were drawn from this spreadsheet, and confirmed by

comparison with the program and interview reports. Statements and observations made in these

reports was also compared and confirmed with information gathered during the literature review,

to ensure accuracy of information concerning movement growth.

Initial Findings

All study participants were asked the question, what are the key elements of an El

Sistema inspired program? The majority of responses were remarkably similar across the

different regions, cultures, and values of each participant. It was universally accepted that an El

Sistema inspired program is one that uses the collective practice of music to affect the social

development goals of the community being served by the program. Many people also used the

term "social change" or "social transformation" to describe the work done by El Sistema

practitioners. Other widely identified key elements included an overall goal of musical

excellence, ensemble-based learning, a high frequency or high intensity schedule (depending on

the capacity of the organization providing El Sistema inspired program), peer learning and

teaching, frequent performance opportunities, and an equally accessible program – free or affordably priced for anyone who wants to participate. Other key elements that were identified, but not as widely, were a sense of joy in the experience, good resource and organizational management, long-term involvement or a multi-age continuum, and community-based programming support.

All of the descriptions of El Sistema inspired programs fell somewhere between Jonathan Govias' "Five Fundamentals of El Sistema" (Govias, 2011) and Tricia Tunstall's ten principles and practices of El Sistema, outlined in both her interview and an article written with Jamie Bernstein (Bernstein & Tunstall, 2013). As an interesting counterpoint, Erik Holmgren was the only participant to have a slightly different assessment of the key elements of an El Sistema inspired program. He summarized the program with three straightforward key elements, a) program that identifies and meets a social need within a community, b) that addresses the need through playing music together, and c) then evaluates how well the need is being met.

Govias' fundamentals include, "1. Social Change: The primary objective is social transformation *through* the pursuit of musical excellence. One happens through the other, and neither is prioritized at the expense of the other. 2. Ensembles: the focus of *el Sistema* is the orchestra or choral experience. 3. Frequency: *el Sistema* ensembles meet multiple times every week over extended periods. 4. Accessibility: *el Sistema* programs are free, and are not selective in admission. 5. Connectivity: Every *núcleo* is linked at the urban, regional and national levels, forming a cohesive network of services and opportunities for students across the country" (p. 21). The last fundamental is slightly problematic to the field, as it states that a cohesive national network of El Sistema inspired programs – available and connected at every level – is a

fundamental aspect of the program. This statement raises some questions: Does it have to be a national program to be El Sistema? Does it have to be a fully developed network of services to be El Sistema? Does it have to look like FundaMusical Bolívar to be El Sistema? The information gathered during this study gives a definitive 'no' to these questions, pushing Govias' fifth fundamental into the territory of a value – but not a fundamental aspect – of the field of El Sistema inspired programs.

Tunstall and Bernstein (2013) outline their ten principles and practices of El Sistema as follows, "Social transformation through musical learning and playing, Accessibility, High standards of musical excellence, Immersion, Ensemble learning, Peer learning, Frequent performing, Involvement with families and communities, Joy, and Ridiculous ambition." Of the last one, they write "Nicola Killean, head of Sistema Scotland, has used this memorable phrase to describe how all the above fundamentals are approached: Goals are set improbably high and then passionately pursued" (p. 1, online). In her interview, Tunstall emphasized the importance of one other core principle: 'multi-age continuum,' which means that students are able to participate throughout their entire childhood and young adulthood, in every *núcleo* setting. These eleven total principles read as an updated and streamlined version of the principles of El Sistema inspired programs outlined by El Sistema USA's website, which was developed by Mark Churchill and Eric Booth (El Sistema USA, 2013). In the final chapter of this document, the key elements of El Sistema inspired programs are further explored and the schemas developed by Govias and Tunstall are further compared with findings from this study.

Conclusions

Using the information gathered, a broad overview was constructed of the field of El Sistema inspired programs and the organizations, networks, and resources supporting the growth of this field. This overview, or cultural map, is outlined in the following chapter. The overview is then compared with findings from the questionnaires and interviews to draw conclusions about the needs of the field, explored in the final chapter of this document.

Chapter Five | International Growth of El Sistema

Regions

The original El Sistema program in Venezuela has inspired hundreds of others, which have emerged in every region of the world. The registered members of the Sistema Global LinkedIn Group number over 850. The following sections outline the growth of the Sistema inspired field in several regions around the globe.

Latin America & Caribbean

The most growth of El Sistema inspired programs has happened in Latin America and the Caribbean, long before most of the English-speaking world even knew about El Sistema. FMSB has inspired its neighboring countries to create their own El Sistema inspired networks nearly as long as El Sistema has existed. In particular, there are well-established, national El Sistema inspired networks in Argentina, Brazil, Columbia, and Mexico. All Central and South American countries have an El Sistema inspired program in some state of development, except for Guyana and Suriname. Additionally, five Caribbean islands have El Sistema inspired programs including Cuba, Jamaica, Puerto Rico, Dominican Republic, and Trinidad and Tobago.

North America

Beyond Latin America and the Caribbean, the other region with the most growth of El Sistema inspired programs is North America. Over 60 El Sistema inspired programs have been founded in the United States, and many added their organization to the Map of El Sistema Inspired Programs in the United Stated maintained on the El Sistema USA website (see image below). Of these programs, over 40 have become dues paying members of the new National

Alliance of El Sistema inspired programs. Further north, Canada has nine El Sistema inspired

programs currently, but that number will double in fall 2013 when the next academic year

begins.
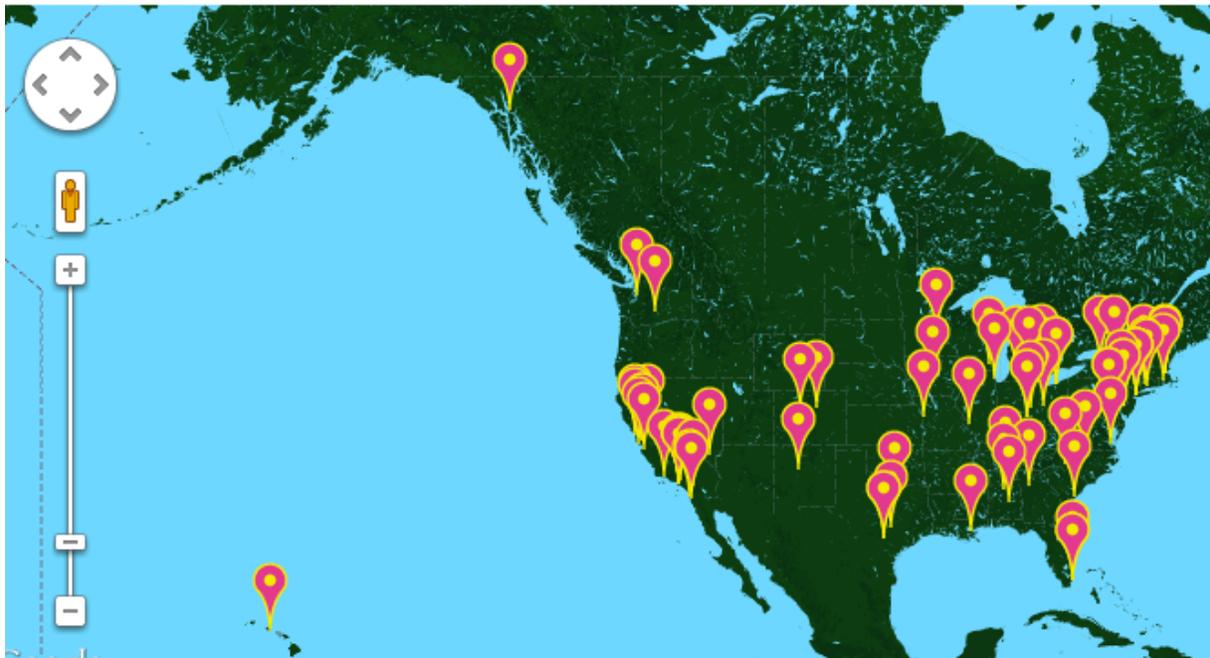
Figure 2: Screenshot taken on May 31, 2013 of map of El Sistema inspired programs in the United States hosted on http://elsistemausa.org/el-sistema/u-s-a/.

Europe and the Middle East

The next largest area of international growth is Europe, which has emerging El Sistema

inspired programs in 16 countries. In the East, programs have started in the Czech Republic and

Slovakia. In the North, programs exist in Denmark, England, Finland, Ireland, Norway,

Scotland, and Sweden. The South has three programs, including Bosnia, Italy, and Portugal.

Western European programs include Austria, France, Germany, and Switzerland.

The Middle East is also included in this section because the two emerging programs in

this region – Armenia and Turkey – are currently members of the Sistema Europe network. El

Sistema inspired programs in Israel and Jordan have been mentioned in passing in news articles

and on blogs, but are not yet operational.

Asia

El Sistema inspired programs have started in four Asian countries, including study

participants Japan and the Philippines. Groups in India and South Korea have also started El

Sistema inspired programs and networks. In early 2012, the Sistema program model was

featured at the UNESCO Arts Education Week hosted in Seoul, South Korea. Representatives

from Sistema Canada gathered with teachers and leaders from Japan, Korea, and China to share

policies and best practices for El Sistema inspired programs (Lee, 2013). Additionally, rich

discussions around these programs have emerged within the Sistema Global LinkedIn Group.

Oceania

El Sistema inspired programs have spread to two countries in the Oceania region. These

programs include the study participants in both Australia and New Zealand. Australia has both a

network and programs, while New Zealand has one program.

Africa

Sistema Africa founder Marshall Marcus describes the development of El Sistema

inspired programs in Africa as a 'period of desire.' Many discussions have started around the

continent about starting El Sistema inspired programs, but only a few of these conversations

have resulted in organizations working to found programs. Marcus (2012) writes, "During the

last year virtual conversations have taken me to Uganda, Kenya, South Africa, Congo-

Brazzaville, Congo-Kinshasa, Kenya, and beyond" (p. 1, online). In the interview for this study,

Marcus also mentioned emerging programs in Kampala, Morocco, and Mozambique. However,

this study was unable to identify if these organizations are currently offering programming.

While there was no participation in this study by African programs, the project blog was viewed

in the United Republic of Tanzania, Mozambique, and South Africa.

Funding

While the original El Sistema program in Venezuela is funded almost entirely by the

Venezuelan government with some support from private foundations, the emerging El Sistema

inspired programs around the globe have different funding structures that include both public and

private funds. The funding information shared by the programs participating in this study was

used as a representative sample of the field.

Public

Eight of the 18 programs that participated in this study receive some kind of public

financial support. The Friends of El Sistema Japan, In Harmony England, El Sistema – Mexico,

and the *Fundación Sinfonia Concertante de Panama* receive support directly from their federal

governments. However, these funds come from the Ministries of Culture or Education, not

social service ministries like the original Venezuelan program. Other public support for

programs come from regional, county, and municipal levels, usually from arts councils and

school districts.

Private

Other sources of funding for El Sistema inspired programs include corporate and philanthropic foundations, non-government organizations (NGOs) ranging from symphony orchestras to religious organizations, a few banks and business sponsorships, individual donors, several universities and conservatories, and occasionally, program fees for students. Despite this diverse web of funding sources, the most prevalent sentiment shared by study participants was that they lacked the funding needed to run robust El Sistema inspired programs. All participants feel that they need more capital for their programs.

Transnational Organizations

Several important transnational organizations have already supported the growth of the global Sistema movement through research sub-committees, advocacy, or direct support through resources and funding. However, there is much potential for further financial and material support from large international organizations working to affect global social change.

Important international cultural policy institutions like UNESCO and UNICEF have supported El Sistema through individual awards or initiatives, and have recently begun to publically recognize the broader value of arts education. UNESCO held their first world conference on arts education in 2006, with the title "Building Creative Capacities for the 21st Century" (Wagner et al, 2006). The second world conference on arts education was hosted in Seoul, South Korea in 2010, with the title "Goals for the Development of Arts Education" (UNESCO IAC, 2010). Even more recently, Seoul was also the site of the first annual UNESCO Arts Education Week in 2012. Another large transnational organization, the International

Society of Music Education also supports El Sistema inspired initiatives through its research sub-group on El Sistema, discussed above.

On a regional level, the Sistema network is supported by Youth Orchestra of the Americas, a 100 person world-class symphony orchestra made up of young adults from more than 20 countries in the Western Hemisphere (Youth Orchestra of the Americas, 2013). As Mark Churchill elaborated on in his interview, the organization is a result of unique collaboration of music programs from North and Latin America, and further builds out and supports the global Sistema field. The European Union Youth Orchestra, which recently hired Marshall Marcus as Chief Executive, is planning to 'grow roots' for their orchestra in order to put the players from the 28 countries of the orchestra more in touch with Sistema inspired initiatives in their own countries. It is hoped that European Sistema inspired programs will help open up new avenues into the existing youth orchestra. Other traditional youth orchestra programs could learn from their examples.

On a broader level, the *Iberorquestas Juveniles* initiative of the Organization of Ibero-American States (made up of Spanish and Portuguese speaking countries) supports El Sistema inspired programs, and is supported by membership made up of fourteen Spanish and Portuguese speaking countries. The Iberorquestas initiative arose from a summit in Chile with the theme, "Social cohesion and social policies to achieve more inclusive societies in Latin America". Organizational objectives include supporting El Sistema inspired programs for artistic and human development, social integration of the most disadvantaged sectors of the population, promotion of Latin American cultural diversity in the field of music, and stimulation of new audiences in the region and expanding job prospects for future music professionals. Action

items include musician exchanges and tours, teacher and leader training, strengthening of

existing orchestral programs, integration of gender and diverse ethnicities, collaboration and

synergy among programs, and increased visibility and advocacy (Iberorquestas, 2013).

Iberorquestas is the only transnational organization offering multi-national support for the

international growth of El Sistema inspired programs.

Support Networks

      In Venezuela, the FundaMusical Bolívar is a state foundation that supports the national

network of Sistema affiliated programs and organizations. The foundation also supports

emerging international El Sistema inspired programs as their own capacity allows. This support

is usually comprised of friendship agreements and hosted learning visits to Venezuela.

      Several national and regional support networks support the field of El Sistema inspired

programs, such as Sistema Italia (national) and Sistema Europe (regional). One organization –

Sistema Global – is working to meet the needs of the entire field of El Sistema inspired

programs, but this organization is still in early stages of development. Strategist and

entrepreneur Glenn Thomas founded Sistema Global in November 2011 after identifying a need

for international connections within the El Sistema inspired field. The Sistema Global mission is

"to connect, encourage, and inspire El Sistema inspired leaders, teachers and advocates world

wide" (Sistema Global, Facebook page accessed on May 31, 2013). The organization currently

operates an online presence on social media sites LinkedIn and Facebook. The open LinkedIn

group operates as an emerging international online forum for El Sistema practitioners, with

participants asking questions, sharing resources, and engaging in general discussion about living

and manifesting the values of El Sistema. In 2013, Sistema Global began taking on projects such

as the Worldwide Literature Review of El Sistema-Inspired projects. It is hoped that this

initiative will be able to grow with relation to the field, offering strategic support to emerging El

Sistema inspired programs and networks around the globe.

Mini Comparative Case Study: North America

The North American continent offers an interesting comparative case study of El Sistema

inspired support networks, which include El Sistema – Mexico, El Sistema USA and the

National Alliance of El Sistema Inspired Programs in the United States, and Sistema Canada.

These three networks offer examples of three different levels of development and several

methods of approaching El Sistema inspired networks.

The oldest and most developed network is El Sistema – Mexico, which was founded in

1989 and currently serves over 45,000 students around the country. The network employs over

40 staff and more than 150 teachers, and has over 180 youth and children's orchestras, over 950

choirs, and over 100 wind bands affiliated with the *Sistema Nacional de Formento Musical*.

According to Executive Director Armando Torres-Chibras, "This federal program works in

collaborations with State and Municipal authorities and civil associations to support all of the

affiliated ensembles." It is federally funded through the National Council of Culture and the Arts

as well as the state, municipal, and civic associations mentioned above and other foundations.

Additionally, this organization currently manages the Iberorquestas program, working to

spearhead advocacy initiatives across the Latin American region.

Two networking organizations currently serve the growing field of El Sistema inspired

programs in the United States, El Sistema USA and the National Alliance of El Sistema Inspired

Programs in the United States (NAESIP), founded in 2009 and 2012 respectively. Both of these

organizations have developed in response to the nonprofit infrastructure and related activity of

philanthropic giving that are unique to the United States. El Sistema USA is a registered

nonprofit organization that supports strategic growth of the U.S. field of El Sistema inspired

programs, which was instrumental to the recent boom of El Sistema inspired programs in the

United States. However, after losing strategic partnership with the New England Conservatory

(NEC) the organization is currently redefining both mission and activities to meet the current

needs of the Sistema inspired field in the United States. New England Conservatory felt that El

Sistema USA did not closely align with the institution's mission, but has recently signed a

friendship agreement with FundaMusical Bolívar to continue to house the Sistema Fellowship

Program (New England Conservatory, 2013). El Sistema USA continues to have significant

name recognition internationally. NAESIP is a registered professional service organization that

has recently ratified bylaws and instituted a Board of Directors, but is still working through

strategic development and planning initiatives to determine potential future activities to serve the

El Sistema inspired field. Recently elected NAESIP Board President Stanford Thompson and El

Sistema USA founder Mark Churchill both report that the two organizations are working to build

partnerships to serve the Sistema inspired field in the United States, but the nature of those

partnerships are still undetermined. NAESIP opened up membership near the end of 2012 and

currently has over 40 dues paying member programs along with individual members. This

organization has emerged in opposition to the organizational model set by FMSB, building

infrastructure and requiring financial investment before offering programming or any significant

contributions to the field. The organization hopes to leverage advocacy and national voice for

the El Sistema inspired field in the U.S., specifically seeking to provide connections to

knowledge and innovation, advocacy, and leadership advancement for Sistema inspired program

teachers, leaders, and volunteers. This organization is designed in response to the nonprofit

infrastructure unique to the United States, and it remains to be seen what benefits this

organization will provide to the fast growing U.S. field of Sistema inspired programs.

The final organization is Sistema Canada in the north, which is quickly growing and will

soon expand to include 18 *núcleos*. The National Arts Council Foundation and the J.W.

McConnell Family Foundation financially support the network. In addition, the Canadian Music

Educators Association endorsed the program model by publishing a position paper. The support

network is structured with an emphasis on independence and free will, and encourages programs

to develop individually to reflect direct community-based need and support. Sistema Fellow

Jonathan Govias wrote about Sistema related activity in Canada in a recent blog post (Govias,

2013), saying "Canada is a world-leader is Sistema-inspired activity. Canadian núcleos are some

of the oldest in North America; Canadian universities have hosted the first academic conferences

related to el Sistema; a national foundation presented the Simón Bolívar Orchestra in its largest

venue to date and formally honoured Maestro Abreu's achievements in 2008; and a Canadian

youth orchestra has set the current gold standard internationally in advocating for and securing

major government funding." He goes on to offer a comprehensive list of Canadian El Sistema

inspired programs (Govias, 2012).

Sistema Canada is a freely structured support network where El Sistema inspired

professionals can come together for professional development, resource sharing, and advocacy

for the field. Sistema Europe also maintains an open support network model, with no formal

organizational or financial structures. In contrast, the nonprofit related structures in the United

States – El Sistema USA and NAESIP – reflect and meet the needs of the El Sistema inspired

programs in the United States, which are predominately nonprofit organizations. El Sistema –

Mexico is the only primarily publically funded network, although Sistema Canada also has some

public funding channels. The three networks reveal how the El Sistema program model can be

tailored to meet the needs of different national or regional populations.

Training Programs

Training and professional development for the El Sistema inspired field is being done at

two levels. Regionally, El Sistema inspired program practitioners are gathering to share

resources and best practices at mini-conferences called *seminarios*. Usually, these gatherings

consist of a successfully operating El Sistema inspired program serving as host to other programs

for several days of workshops, seminars, concerts, and networking. The Social Action Thru

Music Symposium held in Philadelphia during December 2012 was one such gathering, which I

was able to attend while developing this study.

On another level, yearlong training programs are working to increase the capacity of the

field. The New England Conservatory's Sistema Fellowship Program and Longy's Master of

Arts in Teaching (MAT) program are working to train emerging El Sistema program leaders and

teachers respectively.

Research and Evaluation

There are a few projects working to research and evaluate the entire El Sistema field. Individual researchers and several informal research groups are conducting research projects on El Sistema from a variety of fields. Two online resources are working to organize El Sistema related research and resources, including the SERA Archive maintained by Marshall Marcus and the REP + Resource Library hosted by El Sistema Hawai'i and maintained by a team of contributors made of programs and individuals. Recently, Sistema Global launched its first research project, a literature review of El Sistema resources. British researcher Dr. Andrea Creech is leading the team that won the Request for Proposals, and their report should be made available in summer 2013.

Maps of Growth

The figures on the following pages visually illustrate the global growth of El Sistema inspired programs. The first map depicts the countries with El Sistema inspired programs that participated in this study, and the second map depicts all countries where El Sistema inspired programs have been identified as a result of this study. Those countries and the status (operating or emerging) of the Sistema inspired programs in their country are listed on the following table.

Map of Participating Countries

Figure 3. Map of countries with El Sistema inspired programs that participated in this study.

Map of Countries with identified El Sistema inspired Programs

Figure 4. Map of countries with identified El Sistema inspired programs.

Table 1. **List of Countries with indentified El Sistema inspired Programs**

	Country	U.N. Geoscheme Region	Program Status
1	Congo-Brazzaville	Africa	*emerging*
2	Congo-Kinshasa	Africa	*emerging*
3	Kenya	Africa	*emerging*
4	Morocco	Africa	*emerging*
5	Mozambique	Africa	*emerging*
6	South Africa	Africa	*emerging*
7	Uganda	Africa	*emerging*
8	India	Eastern Asia	operating
9	Japan	Eastern Asia	operating
10	Philippines	Eastern Asia	operating
11	South Korea	Eastern Asia	operating
12	Cuba	Caribbean	operating
13	Dominican Republic	Caribbean	operating
14	Jamaica	Caribbean	operating
15	Puerto Rico	Caribbean	operating
16	Trinidad & Tobago	Caribbean	operating
17	Austria	Europe	operating
18	Bosnia	Europe	operating
19	Czech Republic	Europe	operating
20	Denmark	Europe	operating
21	England	Europe	operating
22	Finland	Europe	operating
23	France	Europe	operating
24	Germany	Europe	operating
25	Ireland	Europe	operating
26	Italy	Europe	operating
27	Norway	Europe	operating
28	Portugal	Europe	operating
29	Scotland	Europe	operating
30	Slovakia	Europe	operating
31	Sweden	Europe	operating
32	Switzerland	Europe	operating
33	Argentina	Latin America	operating
34	Belize	Latin America	*emerging*
35	Bolivia	Latin America	operating
36	Brazil	Latin America	operating
37	Chile	Latin America	operating
38	Columbia	Latin America	operating
39	Costa Rica	Latin America	operating
40	Ecuador	Latin America	operating

41	El Salvador	Latin America	operating
42	Guatemala	Latin America	operating
43	Honduras	Latin America	operating
44	Mexico	Latin America	operating
45	Nicaragua	Latin America	operating
46	Panama	Latin America	operating
47	Paraguay	Latin America	operating
48	Peru	Latin America	operating
49	Uruguay	Latin America	operating
50	Armenia	Western Asia	operating
51	Israel	Western Asia	*emerging*
52	Jordan	Western Asia	*emerging*
53	Turkey	Western Asia	operating
54	Canada	Northern America	operating
55	Greenland	Northern America	operating
56	United States of America	Northern America	operating
57	Australia	Oceania	operating
58	New Zealand	Oceania	operating

Chapter Six | Conclusions and Recommendations

Restatement of Purpose and Research Questions

The goal of this research project was to gather a holistic view of the emerging international field of El Sistema inspired programs; simultaneously working to map the global movement while identifying needs for strategic growth. The original El Sistema program in Venezuela has ignited a global movement of El Sistema inspired programs. The network of programs and support is quickly growing, and has many implications for the arts, as well as arts education, arts management, and many other fields. This exploratory and qualitative study gathered information from operating and emerging El Sistema inspired programs and key strategic leaders to investigate the growing field. The inquiry began with a literature review of the development of Western classical music and music education fields, as well as the history and development of El Sistema. This research aimed to fill a gap in research on this emerging field while also contributing strategic development information to the global El Sistema movement. Findings have resulted in four primary recommendations for strategic growth, as well as additional suggestions for development of the field.

The following is the list of research questions that guided this study:

Main Research Question:

- Who comprises El Sistema internationally and what additional structures are needed to encourage continued international growth of the El Sistema network?

Sub Questions:

- What are the key elements of an El Sistema program?

- How and where is the original Venezuelan model of El Sistema being duplicated

  around the world?

- What resources and organizations promote the international growth of El Sistema?

- What strengths and challenges face the growth of the El Sistema movement?

Detailed Summary of Findings

Using the data collected, conclusions were drawn in response to the research question and

sub questions in four main areas: Key Elements of El Sistema, International Growth of El

Sistema, Resources and Organizations Supporting El Sistema, and Strengths and Challenges

Facing the El Sistema Field. The first three areas were explored in earlier sections, but are

reviewed and further explored below. The final area is made up of a SWOC (Strengths,

Weaknesses, Opportunities, and Challenges) analysis of the Sistema inspired field.

Key Elements of El Sistema Inspired Programs

Both questionnaire respondents and interview participants were asked to describe the key

elements of an El Sistema inspired program. The responses to this question were surprisingly

similar across the many communities, regions, and countries that participated in this study –

indicating the universal application of the El Sistema mission and program model. Key

elements of El Sistema inspired programs, as indentified by this study, include:

- *Dual mission of social development and musical excellence* – El Sistema inspired

  programs strive to achieve the dual goals of social change through participatory music

  programming and the pursuit of musical excellence. The program logic model posits that

the skills required to achieve musical excellence are the same skills needed to be a good

citizen and positively contributing member of society.

- *Ensemble-based music making and instruction* – All learning and participatory

  experiences are done as a group with a shared identity and common goal. Instead of

  having students focus on individual achievement like excelling during seating auditions,

  the orchestra is encouraged to work together to create a single, beautiful sound.

- *High frequency or intensity programming* – The program must be frequent or intense, as

  the capacity of the organization running the program allows. The original program in

  Venezuela engages students for 24 hours per week, after school and during the weekends

  when students might be engaged in potentially dangerous or violent activities. The

  program must aim to engage students positively during at-risk times of the day and week.

- *Peer-to-peer learning and teaching* – Students in El Sistema inspired programs are

  encouraged to work together to meet their goals. Stand partners are asked to work

  together to learn parts, instead of competing with each other for top seating assignments.

  This builds the strength and shared identity of the group ensemble.

- *Frequent performance opportunities for students and their community* – El Sistema

  inspired programs perform for their communities frequently to both build skills and

  confidence in students and share their work with families, friends, and other community

  members. Orchestras affiliated with FundaMusical Bolívar perform on a nearly weekly

  basis, with concerts usually taking place on Sundays.

- *Open and equally accessible programs* – The vast majority of El Sistema inspired

  programs are offered free of charge to participants, but a few have programming fees on a

sliding scale. El Sistema inspired programs must be free or openly accessible to anyone

interested in participating, so that costs do not act as a barrier to entry.

In the addition to the six key elements of El Sistema inspired programs outlined above,

this study identified other core values of these organizations. First and foremost, El Sistema

inspired programs should be full of joy, as making music with friends and neighbors is a

fundamentally enjoyable activity. The experience of participating in an El Sistema program

must be a positive and enjoyable one, helping to pull students away from other at-risk activities

and behaviors. Second, programming is ideally offered on a multi-age continuum, so that a

student could participate at any point of their personal development from pre-school through

college and beyond. However, this is limited by the emerging nature of the field and the need for

more network growth before multi-aged El Sistema inspired programming is consistently

available around the world. Third, organizations should be financially stable and run with good

management principles, in order to facilitate the best supported and sustainable programs

possible. Organizations are encouraged to embrace social enterprise and other new and

emerging models of funding to combat issues facing the nonprofit sector and other traditional

funding channels. Finally, programming should be community based, driven by local need of

the particular students and community be served. This final element – community-based

programming – speaks to the "glocalization" of the El Sistema model. *Glocalization* is a term

used to describe the interaction between the local and global, and can be used to understand how

global ideas are adapted to local contexts, communities, and problems (DeSilva & Sharp, 2012).

Table 2. **Comparative list of key elements of El Sistema inspired programs**

When compared with the El Sistema fundamentals and principles outlined by Govias

(2011) and Tunstall (Bernstein & Tunstall, 2013), the findings of this study offer a similar but

further nuanced assessment of the El Sistema program model. Where Govias offers five

fundamentals and Tunstall offers ten principles, this study found six *key elements* and four *core*

values (delineated by KE or CV below). The various assessments are compared in the following

table.

Govias (2011)	Bernstein & Tunstall (2013)	Silberman (2013)
Social Change The primary objective is social transformation *through* the pursuit of musical excellence.	**Social transformation through musical learning and playing.** This is the vision at the heart of El Sistema: that the process of learning and playing music together has the capacity to transform children, their families, and their communities.	**Dual mission of social development and musical excellence (KE)** El Sistema inspired programs strive to achieve the dual goals of social change through participatory music programming and the pursuit of musical excellence.
Ensembles The focus of *el Sistema* is the orchestra or choral experience.	**Accessibility.** El Sistema programs are open, with no auditions, and free for all children.	**Ensemble-based music making and instruction (KE)** All learning and participatory experiences are done as a group with a shared identity and common goal.
Frequency *El Sistema* ensemble meet multiple times every week over extended periods.	**High standards of musical excellence.** The rigorous pursuit of musical excellence is essential to El Sistema's mission of personal and social transformation.	**High frequency or intensity programming (KE)** The program must be frequent or intense, as the capacity of the organization running the program allows. The programs must aim to engage student positively during at-risk times of the day and week.
Accessibility *El Sistema* programs are free, and are not selective in admission.	**Immersion.** Children attend five or even six days a week for several hours. Intensive daily immersion in a	**Peer-to-peer learning and teaching (KE)** Students in El Sistema inspired programs are encouraged to work

	Sistema program gives a child an alternative world where he or she is safe, valued, competent, and connected to others.	together to meet their goals.
Connectivity Every *núcleo* is linked at the urban, regional and national levels, forming a cohesive network of services and opportunities for students across the country.	**Ensemble learning.** Most music learning takes place in ensembles, either full orchestras or sectionals. Private lessons are also part of the El Sistema experience, but the core experience is the ensemble, where children learn the crucial skills of working together.	**Frequent performance opportunities for students and their community (KE)** El Sistema inspired programs perform for their communities frequently to both build skills and confidence in students and share their work with families, friends, and other community members.
X	**Peer learning.** Children are encouraged to be teachers as well as learners, and to be generous with what they know.	**Open and equally accessible programs (KE)** El Sistema inspired programs must be free or openly accessible to anyone interested in participating.
X	**Frequent performing.** Short-term performance goals generate powerful incentives to rehearse intensely and strive for excellence—and the gratification of a job well done spurs the children on to their next undertaking.	*El Sistema inspired programs should be full of joy (CV)*
X	**Involvement with families and communities.** When families and community members feel invested in the work of the program, then El Sistema becomes truly transformational.	*Programming is ideally offered on a multi-age continuum (CV)*
X	**Joy.** Joy breaks out everywhere in a Sistema program: in the passion of teaching, the exuberance of playing, the spontaneous humor and friendship intrinsic to making music together.	*Organizations should be financially stable and run with good management principles (CV)*
X	**"Ridiculous ambition."** Goals are set improbably high and then passionately pursued.	*Programming should be community based, driven by local need (CV)*

International Growth of El Sistema

The study participants represented El Sistema inspired programs from around the world, representing all regions where international growth has been identified. In Latin America, programs inspired by Venezuela have been quietly growing for years and exist in all countries except Guyana and Suriname. Due to strategic work of many individuals and the increased media coverage after 2009, the El Sistema model has spread to North America, Europe, Asia, and Oceania. A handful of programs are also emerging in Africa, although this study was not able to confirm that any African organizations were currently operating programming for students. The sizes and structure of the organizations supporting and facilitating El Sistema inspired programs are as varied as the communities being served. Two programs that participated in this study illustrate this broad spectrum. On one side, the Harmonie Foundation in the Czech Republic serves 20 students, while Sistema Mexico is serving over 45,000 students on the other end. Program partners range from individual schools to federal governments. And the range of funders includes federal, regional, and municipal governments – usually Ministries of Education and Culture; NGOs and a few professional orchestras, bank and business sponsorships; corporate and philanthropic foundations; and individual donors.

Resources and Organizations Supporting El Sistema

The resources and organizations that support the global Sistema network have been discussed in previous sections, but will be summarized further here. FundaMusical Bolívar is the state foundation that manages and supports Venezuela's El Sistema network. While the foundation's primary focus is running Venezuelan programs, it supports international growth as capacity allows by hosting learning visits for El Sistema inspired program representatives and

others, signing friendship agreements with many El Sistema inspired programs around the globe,

and speaking at workshops and conferences for El Sistema practitioners. In addition to FMSB,

several transnational organizations support the growth of the field through initiatives or sub-

committees including the Youth Orchestra of the Americas, Iberorquestas and the Organization

of Ibero-American States, ISME, UNESCO, and UNICEF. There is much potential for further

support both financially and otherwise from these organizations and their peers. Networking

organizations that help field development include Sistema Global on an international level as

well as the more regionally focused organizations El Sistema USA and the National Alliance of

El Sistema Inspired Programs in the United States, Sistema Europe, and Sistema Africa.

Prominent national networks exist throughout Latin America and are emerging in Canada, Italy,

Australia, and South Korea.

Capacity of the field is strengthened by a handful of training and professional

development structures serving the global El Sistema network. The Sistema Fellowship Program

hosted at the New England Conservatory is training future leaders and managers of El Sistema

inspired programs, but at this point only has funding secured through the 2013-14 academic year.

The Master of Arts in Teaching (MAT) program hosted by Longy School of Music at Bard

College and the Los Angeles Philharmonic and Heart of Los Angeles (HOLA) program is

training future teachers for El Sistema inspired programs. The MAT program is currently in its

pilot year, but hopes to expand programming to serve many more sites around the world.

Regionally, El Sistema professionals gather at local *seminarios*, or mini-conferences

where resources and lessons can be shared. These local workshops are naturally popping up

around the United States and beyond, and are often hosted by a more established El Sistema

inspired program or networking organization. These mini-conferences are often planned to

coordinate with a tour of the Simón Bolívar Youth Orchestra or other FMSB concert, so that

representatives from Venezuela can participate. *Seminarios* are key spaces for face-to-face

gatherings and learning, where neighboring Sistema practitioners can share resources, best

practices, and lessons learned. And the locally driven nature of these events allows them to be

tailored to the specific needs of the attendees. Additionally, these gatherings reflect the value of

peer-to-peer teaching and learning, which is embraced at every level of the Sistema movement.

Two online resource libraries serve the Sistema inspired field, the SERA Research

Achieve hosted by Marshall Marcus and the REP + Resource Library hosted by Sistema Hawai'i

and maintained by Sistema Fellows. However, both are in English and are under utilized across

the field.

Strengths and Challenges Facing the El Sistema Inspired Field

The global Sistema field has many strengths and opportunities, but also faces weaknesses

and challenges to continued growth. A key strength of program is the momentum created in

2008 by Gustavo Dudamel's appointment as Musical Director of the Los Angeles Philharmonic

and José Antonio Abreu's receipt of a 2009 TED Prize, which he used to help found the Sistema

Fellows Program. A surge of news articles, documentaries, and other features of the program

surrounding these events vastly increased name recognition and helped spur resource

development for program growth in the last five years. The program continues to be featured

regularly in news items around the world. Another strength is the universal application of the

idea to use art as a tool for social development, which does not need to be limited to classical

music or even the musical arts. The El Sistema program model can be applied to any creative

field, and several emerging El Sistema inspired programs have discussed offering programming for all arts disciplines. The Sistema program model – based in innovative thinking and experimentation – sets an example for all social development and arts education programs and has many lessons for community-based initiatives in the twenty-first century.

Key opportunities for the El Sistema network is the emergent nature of the field, allowing Sistema professionals to experiment with new models of organization and program structure. The model itself offers new ways to design and operate both social development and arts programs, and the field is embracing new operational models at every level of the network. At this point in development, early El Sistema practitioners will have significant impact on how the global Sistema movement grows and can build both their ideal network and ideal community values. Sistema inspired leaders have demonstrated the peer-to-peer learning and teaching and community-based elements of the program model, and have built a collaborative and open network of programs and organizations. FMSB has flourished in an experimental and driven culture, where new ideas are quickly implemented and developed (or removed as needed) with hard work and dedication to encourage innovative practices. Further opportunities lie in the potential of the program to positively affect the contracting fields of classical music and music education.

The primary challenge facing the El Sistema field is a lack of funding for programs and projects supporting strategic growth. While the emerging nature of the field offers many opportunities, dedicated volunteers and musicians are still building the basic infrastructure and resources for the network. FMSB has successfully harnessed both conventional and untraditional funding sources for their programming, and sets an example of what can be

achieved through hard work and innovation. Another challenge is the limited infrastructure

dedicated to resource sharing and communications across the field, and a comprehensive digital

hub of resources has yet to be fully developed. An online hub that provides a centralized

resource sharing and communication space is a priority for development of the field.

A key weakness facing the field is a lack of coordinated research and evaluation,

particularly in measuring the social impact of the program model. Several informal research

groups have started directed study of El Sistema inspired programs and Sistema Global has

rolled out its first research project, a literature review of El Sistema related resources. However,

the existing research addressing El Sistema has only begun to explore the new program model

and emerging field. Another important weakness is a lack of management and leadership

training across the field. Most El Sistema inspired programs are led by passionate musicians and

teachers (or teaching artists), who are dedicated to making a positive impact in their local

communities, but few program coordinators have formal arts management or nonprofit

management experience. Leadership training for teachers and leaders alike will help support the

work being done and the growth of the field.

Identified Needs

Moving beyond the primary and sub research questions, study participants were also

asked to identify the needs of their programs as well as the growing Sistema field. The most

commonly identified need across all programs and participants was funding, for operations and

programming, professional development opportunities, digital and physical networking, and

overall strategic growth of the field. As this is an emerging global network in early stages of development, there are many opportunities for investment and further growth.

The other specifically identified needs were training for El Sistema practitioners and more lessons sharing from Venezuela. Since the El Sistema model focuses on social development through music, there are subtle differences between traditional music education and the musical experiences of El Sistema inspired programs. Although the program is based on a traditional model of youth orchestras and classical music traditions, it has fundamentally different goals and values that must be communicated by the teachers and leaders of *núcleos* and networks. The field is still working to identify the best teaching practices of the El Sistema model. From a management perspective, many study participants identified a desire for further arts management training for the field.

FMSB has built a robust and exemplary program over the past four decades that inspires many. As a result, El Sistema inspired programs around the world look to Venezuela for best practices, model programs, resources, stories, and inspiration. FMSB offers help as much as capacity allows, but is limited by its need to focus on running El Sistema in Venezuela. Additionally, the growth of the organization and affiliated programs reflects the cultural values of Venezuela. The United States of America has a data driven culture, where nonprofit and other community benefit organizations must constantly evaluate program impact, fiscal stability, and good management practices for tax, funding, and other purposes. But Venezuela has not developed the same emphasis on data-driven project investment and reporting, so FMSB has not needed to invest in serious program impact or evaluative studies or reports on the El Sistema

model. While FMSB is understandably focused on running programs, the entire Sistema network would benefit from more overall reporting on FMSB program activities.

Finally, the study identified other desired potential avenues for support of the field. Leaders and teachers in the El Sistema field want more opportunities for resources sharing and networking, both physically and digitally. Some programs also discussed developing instrument making and repair networks to support regional El Sistema networks, as have been piloted in Venezuela. Support is also needed for instrument acquisition and transportation as well as collaborative and strategic partnerships.

Recommendations for Strategic Growth

This study identified four key initiatives for strategic growth of the El Sistema field. It is recommended that networks and organizations working to develop the El Sistema field should collaborate and focus on the following initiatives to help effectively grow the Sistema network and support emerging El Sistema inspired programs. These initiatives are as follows:

- *Increased Funding* – Funding is needed for program growth and projects that support strategic growth of the field. Unconventional and new streams of funding should be explored and harnessed, as demonstrated by FMSB's example.
- *Teacher and Leader Training* – Teachers need training on the El Sistema model and program leaders need arts management training. While training often separates teachers and leaders, both of these groups should collaborate and work together to help further develop themselves and the field.

- *Resource Gathering and Sharing* – Opportunities and spaces for resources sharing, both in person and online, are needed for strategic growth. An online hub of resources and communication channels is a priority for program and field development.

- *Research and Evaluation* – The field needs more research and evaluation projects at every level from management to education to social impact. Data gathered will help leverage further resources and funding for the field.

Other Specific Recommendations

As a natural result of this study, project participants made several other uncategorized but useful recommendations for the strategic growth of the Sistema field. Additional potential initiatives for strategic growth are as follows:

- *Formal Arts Management Training* – Partnership between the El Sistema network and an established arts management program would help strategic development of field leadership. This partnership could be modeled after the yearlong programs hosted by New England Conservatory and Longy School of Music of Bard College.

- *Further Investment in Capacity Building* – Programs that build capacity for the field should be expanded and further developed. Continuation and growth of programs training the future El Sistema teachers and leaders – like the Sistema Fellows Program and Longy's MAT program – will only serve to further strengthen the field.

- *Other Designated Model Networks* – Venezuela has spent many financial and other resources on hosting learning visits for Sistema practitioners and enthusiasts from around

the globe. The well-established El Sistema inspired programs in Argentina, Brazil,

Columbia, and Mexico should be recognized as other leading model networks, and could

host comparable learning visits and other resource sharing opportunities. Further

potential lies with Iberorquestas, which supports training activities in Venezuela,

Argentina, Columbia, Mexico, Spain, and Guatemala.

- *Internal In-kind Donations* – Many emerging El Sistema inspired programs do not have

   the financial resources to pay dues to an advocacy or networking organization that would

   further develop the El Sistema field. However, many could dedicate staff time to shared

   regional or national initiatives. In particular, Eric Booth suggested that emerging

   programs could dedicate 10% of staff time toward initiatives for strategic growth of the

   field. This could be done through community-wide or regional advocacy networks.

- *International Musician Exchanges* – Many study participants mentioned a desire for

   international musician exchange programs, where musicians from El Sistema inspired

   programs in different countries would travel to other programs to allow for further peer-

   to-peer learning and teaching opportunities. Iberorquestas already supports several

   musician exchange initiatives.

Avenues for Future Research

As this research explores an emerging field, there are many possible areas of further

research on the El Sistema model, the social impact of the program, and the growth of the

Sistema inspired network. In particular, study participants requested more data on the social

impact of the Sistema program model for funding proposals and policy initiatives. One

interview question for this project asked participants to speculate where they would like to see

the El Sistema movement in five and ten years. There were many imaginative suggestions, but

ultimately most participants hoped that El Sistema would be more widely recognized and

embraced as a program model and broader movement working for social change. Overall, most

project participants want a broader social understanding and recognition of the fact that music

and the arts change lives for the better. This goal requires long-term, coordinated research and

advocacy work across several fields to help shift social understanding to support programs like

El Sistema. Other questions raised by this project include:

- What are the successful organizational models for El Sistema inspired programs? Have
  regional or national models emerged? Is there a globally applicable model?

- How can the social impact of El Sistema inspired programs be best measured? How can
  this information be used to leverage resources for development of the Sistema network?

- How can El Sistema inspired programs around the globe harness social and community
  development funding like FMSB has in Venezuela? How can other governments and
  publically funded entities be encouraged to invest in the El Sistema program model?

- What long-term effects will the El Sistema program model have on traditional classical
  music and music education fields and programs?

- Will other arts disciplines and creative fields embrace the El Sistema program model?
  Can the program model be translated to non-performance based disciplines and fields?

Final Conclusions

As explored in this study, the emerging field of El Sistema inspired programs has quickly spread around the world, but it is facing the growing pains of any global social movement. El Sistema has introduced a new model of funding for the arts and arts education, while opening up a path to self-expression and personal development for at-risk children and youth around the world. Additional benefits of the Sistema movement include increased diversity in both the people making up traditional music organizations, their musicians, and the communities being served by classical music and music education programs. However, more resources and strategic development are needed to help support growth of the global Sistema network. This study worked to map the emerging international field and offered four strategic recommendations for growth, including *Increased Funding, Teacher and Leader Training, Resource Gathering and Sharing,* and *Research and Evaluation.*

In 1991, Wolf and Burger wrote "Educators now argue that the arts are viable, and indispensible, ways of knowing, contributing to, and participating in a culture" (p. 121), which is an argument that has only continued to grow. While being interviewed for the documentary *Tocar y Luchar*, El Sistema founder Abreu said, "Whoever creates beauty by playing an instrument and generates musical harmony, begins to understand from within what essential harmony is… human harmony" (Quote transcribed from Arvelo, 2006). The recent international growth of El Sistema inspired programs has continued to fuel the debate around the cultural value and relevancy of the arts. Furthermore, the drive of El Sistema is thrust by Latin American culture, which is infusing orchestras, repertoire, and audiences with new energy and activity around the world (Tunstall, 2012).

Time will tell how the more traditional cultural institutions and government funding structures respond to the Sistema movement. Keller (1990) writes, "Within institutions, municipal government arts commissions, state and federal arts agencies, foundations and corporations, and, most of all, within the arts professions themselves, a clearer understanding must be developed of what is missing in many segments of our society, what will be gained for all members of society in the opening of cultural opportunity, and what kind of financial restructuring will establish the transformative mechanisms to make meaningful and productive the concept of community and cultural self-determination" (p. 168). The Sistema model is one new understanding that embraces cultural diversity, financial restructuring, and the myriad other issues facing classical music, music education, and the world as a whole. In fact, El Sistema may just be the program model that can meet the needs of our increasingly global, twenty-first century society.

Appendix A: Recruitment Materials

Introductory Email: *Questionnaire*

Greetings El Sistema supporter,

My name is Lauren Silberman I am a master's candidate in Art Management at the University of Oregon. I am conducting a study of the international growth and needs of the El Sistema network as part of my final project *Globalizing El Sistema.* As a component of this project, I am working to gather information about as many of these new and developing El Sistema inspired programs as possible around the world. You have been identified as someone affiliated with one of these emerging programs.

I have put together a bilingual questionnaire (available in English and Spanish) to gather preliminary information about El Sistema inspired programs like yours. Information gathered will be used to create a publicly available cultural map of El Sistema as well as a needs assessment for international support and networking structures. If you are able to contribute to this study, the questionnaire will require approximately thirty minutes and will require you to gather basic identifying information about your organization or program. Participation in this study is completely voluntary and completion of the survey will indicate your willingness to participate in the study. Links for the survey are below.

- English: http://survey.qualtrics.com/SE/?SID=SV_72NemqX9S6MwKO1
- Spanish: http://survey.qualtrics.com/SE/?SID=SV_40YsYdTBpASJA1f

The data collected will provide the first international overview of the international El Sistema network. Your information will help map the international growth and needs of El Sistema. You can read more about my project here: http://globalizingelsistema.wordpress.com/

If you require any additional information or have any questions about this study, please do not hesitate to contact me.

Thank you very much for your time,
Lauren

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Lauren Silberman
M.A. Candidate, Arts Management
Arts and Administration Program
University of Oregon

Introductory Email: *Interview*

Dear [*name*],

I would like to invite you to participate in my Master's research project about the growing international El Sistema network, which is working to generate a global cultural map of El Sistema as well as a needs assessment for continued, sustained growth of the network. In conjunction with a questionnaire for emerging El Sistema programs, I am conducting interviews with key leaders of the movement. As [*insert role*], you are a strategic leader of the international El Sistema movement. I believe that your perspective and insight would greatly enrich the research data and would be very valuable to the project.

If you decide to participate, you will take part in an interview (no more than one hour in length) by videophone or telephone. Interview questions and a consent form would be provided to you in advance and the interview can take place during or outside of your job site and work hours. With your permission, I would also audio record the interview and use the information to help map the international growth and needs of El Sistema. This study is completely voluntary.

Thank you very much for your time and consideration!

Sincerely,
Lauren

--
Lauren Silberman
M.A. Candidate, Arts Management
Arts and Administration Program
University of Oregon

Appendix B: English Questionnaire

Questionnaire

This questionnaire is part of a research project called *Globalizing El Sistema*, conducted by Lauren Silberman from the University of Oregon Arts and Administration Program. The purpose of this research is to map the international growth and needs of the El Sistema network and to identify the international cultural policy, organizations, and resources supporting the global expansion of El Sistema. The potential benefits to the study include increased understanding of the varied programs and organizations that comprise El Sistema as well as increased knowledge of resources available to the movement. The study will also include a needs assessment of potential support and networking structures within the system to promote continued international growth.

Your participation in this study is voluntary. If you chose to participate, your consent is given by completion of this questionnaire. Any information given in this questionnaire will be shared with Fundación Musical Simón Bolívar, Sistema Global, and other El Sistema organizations and included in a cultural map of El Sistema that will be publicly available on the internet.

In the first half of this questionnaire, a response is required for each question in order to continue through the survey but it is entirely up to you how to fill out the answers. The extended second half of the questionnaire is optional, but provides a more holistic picture of your program. *Please only share information that you are comfortable having publically available.*

Thank you very much for your interest and participation in this study!

A. Basic

1. Please provide basic contact information for your organization or program.
    a. Name
    b. Affiliated with (if applicable)
    c. Primary Contact
    d. Mailing Address
    e. Country
    f. Website
    g. Email
    h. Phone
    i. Fax

2. When was your El Sistema inspired program founded?

3. If applicable, how many students do you currently serve?

4. How many staff and/or teachers does your program employ?

5. Who are the primary partners of your organization or program? If applicable, please list any community groups, foundations, or other institutions that have partnered with or support your program.

6. What are the primary funding sources for your organization or program?

7. What would help your organization or program provide El Sistema activities?

B. Extended

8. What are the key elements of an El Sistema program?

9. Why does your community need an El Sistema program?

10. How does your organization carry out the social and community development mission of El Sistema?

11. What interaction, if any, does your organization or program have with Fundación Musical Simón Bolívar or Sistema Global?

12. What additional training would you like to see provided to El Sistema organizations or programs?

13. What additional support structures within the El Sistema network would help you manage and grow your program?

14. What other observations can you provide about the El Sistema movement?

Appendix C: Spanish Questionnaire

Cuestionario

Este cuestionario es parte de un proyecto de investigación llamado *Globalizando El Sistema,* conducido por Lauren Silberman del Programa de Arte y Administración de la Universidad de Oregón. El propósito de esta investigación es el de trazar en el mapa las necesidades y el crecimiento internacional de la rad de El Sistema y de identificar la política cultural internacional, las organizaciones, y los recursos que apoyan la expansión global de El Sistema. Los beneficios potenciales de este estudio incluyen un mayor entendimiento de la variedad de los programas y las organizaciones que forman El Sistema, y también un mayor conocimiento de los recursos disponibles al movimiento. También, el estudio va a incluir una evaluación de las necesidades del apoyo potencial y de las estructuras de la red dentro del sistema para promover una continuación del crecimiento internacional.

Su participación en este estudio es completamente voluntaria. Si usted elige participar, su consentimiento es otorgado por el hecho de completar este cuestionario. Su información en este cuestionario va a ser compartida con la Fundación Musical Simón Bolívar, Sistema Global, y otras organizaciones de El Sistema y serán incluidas en un mapa cultural de El Sistema que va a estar disponible al público en la Internet.

En la primera mitad de este cuestionario, cada pregunta necesita una respuesta antes de que se puede continuar con el resto del cuestionario. Sin embargo, usted puede elegir cómo contestar esas preguntas. La segunda parte es una extensión y esa parte del cuestionario es opcional, pero le permite entender su programa en una manera mas holística. *Por favor, solo comparta información que la hace usted a sentir cómodo para ser disponible al público.*

¡Muchas gracias por su interés y participación en este estudio!

A. Básico

1. Sírvanse proporcionar información básica de contacto para su organización o
   programa.
   a. Nombre
   b. Afiliado con (si es aplicable)
   c. Contacto Primario
   d. Dirección Postal
   e. País
   f. Página o sitio web
   e. Correo electrónico
   h. Teléfono
   i. Facsímil ó Número de Fax

2. ¿Cuándo fue fundado (o cuando empezó) su programa inspirado de El Sistema?

3. Si es aplicable ¿a cuántos estudiantes atienden ustedes actualmente?

4. ¿Cuántos maestros y/o empleados tiene su programa?

5. ¿Quiénes son los socios primarios de su organización o programa? Si es posible, haga una lista de cualesquiera de los grupos comunitarios, fundaciones, u otras instituciones que se has asociado o han apoyado a su programa, por favor.

6. ¿Cuáles son las fuentes primarias para fundar su organización o programa?

7. ¿Qué se puede ayudar a su organización o programa a implementar actividades de El Sistema?

B. Extensión

8. ¿Cuáles son los elementos claves (o importantes) de un programa de El Sistema?

9. ¿Por qué necesita su comunidad un programa de El Sistema?

10. ¿De qué manera se realiza la misión de desarrollo comunitario y social de El Sistema?

11. ¿Qué interacción (si alguna) tiene su organización o programa con la Fundación Musical Simón Bolívar ó Sistema Global?

12. ¿Usted quisiera ver entrenamiento adicional por los programas y organizaciones de El Sistema? Explique, por favor.

13. ¿Qué estructures de apoyo adicionales dentro de la red de El Sistema le ayudarían a administrar y desarrollar su programa?

14. ¿Usted puede dar otras observaciones acerca del movimiento El Sistema? Explique, por favor.

Appendix D: Interview Consent Form

Informed Consent for Participation in *Globalizing El Sistema*
Lauren R. Silberman, Principal Investigator
University of Oregon Arts and Administration Program

Introduction
You are invited to participate in a research project titled *Globalizing El Sistema*, conducted by Lauren Silberman from the University of Oregon Arts and Administration Program. The purpose of this study is to explore and map growing international field of El Sistema inspired programs. You were selected as a possible participant because of your role with [*insert organization name*].

Description of the Study Procedures
If you decide to take part in this research project, you will be asked to participate in a video or telephone interview, lasting approximately one hour, during March or early April 2013. Interviews will be scheduled at your convenience and questions will be provided beforehand for your consideration. In addition to handwritten notes, with your permission, I will use an audio tape recorder for transcription and validation purposes. You may also be asked to provide follow-up information through phone calls or email.

Affects of Being in the Study
The purpose of this research is to map the international growth and needs of the El Sistema network and to identify the international cultural policy, organizations, and resources supporting the global expansion of El Sistema. The potential benefits to the study include increased understanding of the varied programs and organizations that comprise El Sistema as well as increased knowledge of resources available to the movement. The study will also include a needs assessment of potential leadership and/or support structures within the system to promote continued international growth.

There are minimal risks associated with participating in the study, particularly since this phase of research is exploratory in nature. However, this study plans to openly identify all participants. If you choose to express critical or negative perceptions of or feelings about the program with which you work, this could affect your employment or relations with this program and/or individuals associated with it if those comments are included in the final study and you are identified in association with them.

Payments & Costs
You will not receive any payment to participate and there is no monetary cost for you to participate in this research study.

Confidentiality
Any information that is obtained in connection with this study will be carefully and securely maintained. Any information that is obtained in connection with this study and that can be

identified with you will remain confidential and will be disclosed only with your permission. You will be contacted via email after the interview with summary documents and you will be allowed to review and possibly revise any comments and information prior to reporting or publication. *Your consent to participate in this interview, as indicated below, demonstrates your willingness to have your name used in any resulting documents and publications.*

Voluntary Participation
Your participation in this study is voluntary. If you decide to participate, you are free to withdraw your consent and discontinue participation at any time without penalty.

Questions & Contact Information
If you have any questions, please do not hesitate to contact me at (+1) 650-296-7120 or silberman11@gmail.com. You can also contact my advisor, Dr. Patricia Dewey, at pdewey@uoregon.edu. Any questions regarding your rights as a research participant should be directed to the Office for the Protection of Human Subjects, University of Oregon, Eugene, OR 97403 or (+1) 541-346-2510. You will be given a copy of this form to keep.

Statement of Consent
Please read and circle the option you are comfortable with (Yes or No) to indicate your consent to each aspect of this project.

YES / NO – I consent to the use of audiotapes and note taking during my interview.

YES / NO – I consent to my identification as a participant in this study.

YES / NO – I consent to the potential use of quotations from the interview.

YES / NO – I consent to the use of information I provide regarding the organization with which I am associated.

YES / NO – I wish to have the opportunity to review and possibly revise my comments and the information that I provide prior to the data appearing in the final version of any publications that may result from the study.

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

Print Name:_____

Signature:_____ Date:_____

Thank you very much for your interest and participation in this study!

Appendix E: Interview Questions

Interview Questions for *Globalizing El Sistema*
Lauren R. Silberman, Principal Investigator
University of Oregon Arts and Administration Program

1. Can you please start by identifying yourself and your position for the recording?

2. What are the key elements of an El Sistema program?

3. What is your role within El Sistema?

4. When did you first get involved with El Sistema?

5. How have you observed El Sistema grow since that time?

6. How have you seen the social and community development mission of El Sistema translate across the growing El Sistema field?

7. What are the internal leadership structures within El Sistema?

8. How would you describe the leadership style of these structures?

9. How do these structures support international El Sistema programs (identifying for the purposes of this study as El Sistema programs outside of Venezuela and the United States)?

10. What other support and/or resources are available to international El Sistema programs?

11. What gaps of support for international El Sistema programs do you observe?

12. How would you like to see these gaps filled?

13. Where do you see El Sistema in five and ten years?

14. What other observations can you provide about El Sistema on an international level?

Appendix F: Interview Coding Form

Interviewee:

Date:

Interview Location:

Participant Background:

Consent: _____ Oral _____ Written _____ Audio Recording _____OK to Quote

Codes: El Sistema Mission (M), Movement Growth (MG), Program Growth (PG), Program Support (PS), Leadership (L), Resources (R), Gaps in Resources (GR)

Interview Summary:

Coding	Information	Notes

Appendix G: Study Participants

- **El Sistema – Mexico** (Mexico): http://fomentomusical.conaculta.gob.mx

- **Instituto de Cultura** (Mexico): http://www.facebook.com/ATocarMazatlan

- **Progressions Project – San Jose Jazz** (United States):

  http://sanjosejazz.org/progressions.html

- **Friends of El Sistema Japan** (Japan): http://www.elsistemajapan.org/top_e.html

- **Sistema New Brunswick** (Canada): www.nbyo-ojnb.ca

- **Harmonie Foundation** (Czech Republic): www.nfharmonie.cz

- **Kalikolehua – El Sistema Hawai'i** (United States): www.kalikolehua.com

- **Bairnsdale Crashendo!** (Australia): http://sistemaaustralia.com.au/crashendo.html

- **Play On, Philly!** (United States): www.playonphilly.org

- **Josiah Quincy School Orchestra Program** (United States): http://jqsop.org

- **In Harmony England** (England): http://www.inharmonytelfordstoke.org/

- **Sistemang Pilipino – El Sistema for Cebu** (Philippines): www.sistemangpilipino.org

- **Just Start Strings – Jacksonville Symphony Association** (United States):

  www.jaxsymphony.org/education

- **Sistema Italia** (Italy): www.federculture.it

- **Fundación Sinfonia Concertante de Panama** (Panama): www.funsincopa.org

- **The YOURS Project – El Sistema Chicago** (United States):

  www.peoplesmusicschool.org

- **Toi Akorangi – Sistema Whangarei** (New Zealand): www.wymusic.co.nz

- **Sistema Australia** (Australia): www.sistemaaustralia.com.au

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