



# Overview and Research Process

In response to a member request, ABA reached out to several member organizations in opera and symphony to ask about their approach to education program impact measurement. We heard back from 8 organizations.

## Participating Organizations

**ALLEY  
THEATRE**

**COCC** CANADIAN  
OPERA  
COMPANY

 **Houston  
Grand  
Opera**

 **Nashville  
Symphony**

  
**OREGON  
SYMPHONY™**

  
**SAN FRANCISCO  
OPERA**

**SDOPERA**

 **SARASOTA OPERA**

## Questions Asked

1. What K-12 programs do you currently offer (i.e., after the disruptions of 2020-2021 school years)?
2. Regarding your education programs, what is your mission? What is your vision?
3. In general, how do you currently measure impact of your programs? How do you define success?
4. Would you say you are primarily gathering activity metrics (number of programs, number of schools, number of students) or impact metrics (change in skills or knowledge observed or tested)?
5. What is the balance of short-term vs long-term impact outcomes that you collect?
6. Over what period do you collect impact metrics? What kind of impact metrics are you looking for short-term and long-term?
7. What is your balance and budget allocation between in-school and public programming (i.e., 50% in schools and 50% public)?
8. How are your programs funded? Do you charge for them or are they underwritten? What do you charge? If underwritten, what type of funders are supporting them? Are the funders supporting education work different from the funders supporting 'mainstage' work?

# Regarding Your Education Programs, What Is Your Mission? What Is Your Vision?



SAN FRANCISCO  
OPERA

Our mission is to support students and educators in **developing essential creative capacities** necessary for thriving in a society impacted by global culture. We emphasize three things: arts integration, multiculturalism, and community building. These three focus areas intersect to create an opportunity for **healing, creativity, and community building**.



Programming from the CPP department aims to:

- Make Opera **accessible to underserved communities** where participants of diverse backgrounds and education can engage in creative exploration and provide exceptional and meaningful learning opportunities for students.
- Introduce students to opera through **hands-on activities** that explore every element of an opera, from storytelling and composition, to performance and design
- Spark **creative power through culturally responsive and engaging learning experiences**
- **Demystify Opera** and find relevance to modern society through this form of story telling
- Use Arts Integration to **process literacy and social well-being**



One of HGO's chief strategic goals is **creating profoundly enriching experiences for our diverse audiences**. In our Community and Learning programs we focused on **meeting our community where they are** and finding ways to support the work they are doing, understand the goals they are trying to achieve, and work with them to find programming and partnerships that serve our mutual goals. We are charged to listen to, partner with, and champion the people of our city and beyond. We drive programs and programming that are responsive to community needs and **serve as the bridge between our company and our community**.

## SDOPERA

The mission is multi-faceted:

- To make high-quality arts instruction and experiences accessible to those **who typically do not have access**
- To target historically **marginalized areas of the region** and address inequities
- To demonstrate that **opera, the transformative and expressive power of the human voice, and telling stories with music in all its forms**, can:
  - have a significantly high impact on the health and well-being of individuals and communities
  - elevate the voices of those often not heard
  - inspire empathy within and among communities

Vision: San Diego Opera Education builds community across the region and **demonstrates how an anchor arts institution can play a significant and integral role in a thriving and equitable community**.

## ALLEY THEATRE

Applied theatre at the Alley (Alley ECE) is a national driving force for innovative arts education. We **pioneer arts integration**, cultivate the **next generation of theatre artists**, and **foster community discourse**.



Nashville Symphony's Education & Community Engagement programming seeks to strengthen the Symphony's position as a **leader in music education** and **deepen our engagement with the community**.



OREGON  
SYMPHONY™

*What is your mission?* To introduce classical music, to **inspire and support young music-makers** and life-long learners.  
*What is your vision?* To engage in a way that **invites audiences to learn to play an instrument/make music** an important part of their everyday lives.



Education is part of Sarasota Opera's mission: Produce outstanding opera true to the vision of the composer **to enrich, entertain, and educate our communities, as well as patrons from across the state** and around the world. We do not have a separate mission for our education programming.

# How Do You Measure Impact Of Your Programs? How Do You Define Success?

## Qualitative Feedback

“Our program has annual response forms for teachers, and for principals, intermittently we survey students themselves.”

“Student/teacher feedback forms, new regional areas of reach, maintaining current records of number of engagement insights for each program”

“We use pre and post surveys where possible, in most cases post survey only.”

“Feedback from participants, teaching artists, parent/guardians, classroom teachers (verbal, written, video)”

“I go to the performance at the beginning and end of the year and hear a difference. “

## Internal Rubrics

“We self-evaluate all programs through a multi-layered rubric system”

“We utilize logic models”

“Audience crossover is a big seller for [individual] funders. With our elementary string residency, we bring all those students and their parents to the hall early in the year. We see how many come back.”

## Quantitative Metrics

### Direct

“Individuals reached, number of instructional/programming hours, etc”

“We compare our data and statistics with national measurements (Opera America is main resource)”

### Holistic

“We use PEAR’s [Holistic Student Assessment](#) (61 questions for students to assess social-emotional and developmental well-being) “

### Internal/Indirect

“Maintaining relationships with partners and actively seeking out new partnerships.”

## Success Definitions

“Identifying objectives before something begins, and carefully working toward those objectives, and only changing objectives when all are in agreement – staying on the same page with all stakeholders and constituents.”

“For most “Maker” activities’ success is also assessed much like project-based learning through observation, quality of process, implementation and presentation.”

“We have teachers and parents... stating that it is “a critical part of their students’ well-rounded education.”



# Would You Say You Are Primarily Gathering Activity Metrics Or Impact Metrics?

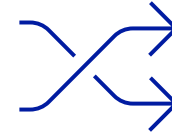
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## Primarily Activity Metrics

“In a casual way in which we conduct qualitative research, we do not engage in impact metrics which can be flawed in measuring causality. So the metrics we do gather can be considered activity metrics.”

“Historically we have used activity metrics, but are transitioning to impact measurement, we are still learning how to capture this well.”



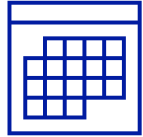
## A Combination of Both

“We are tracking both simultaneously to evaluate ROI and/or the activities relationship to our mission and the market needs.”

“For our concerts and in school performances it is mostly activity metrics, but for our private lessons, mentoring, and coaching it is measured by increase in skills and increased confidence in students' participation in performance opportunities in school and community orchestras and bands.”

# What Is The Balance Of Short-Term Vs Long-Term Outcomes That You Collect?

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## Mix of Long-Term and Short-Term

“Without staying on top of long-term outcomes in relationship to quality of deliverables that adequately meet “market” needs, the short-term activity metrics are harder to sell and implement, therefore we keep all outcome plates spinning.”

“Longer-term: we want to see string education shift in Nashville. We’re seeing how we can increase those numbers. Looking at numbers of string programs in the public school programs We now have 4 elementary string programs, where there were none before this.”

“Our program is focused on long-term engagement, that allows us to become embedded in a school community, and part of a grand arts education plan for the school. The long-term impact is reflected in case studies, participant surveys, and anecdotal feedback”



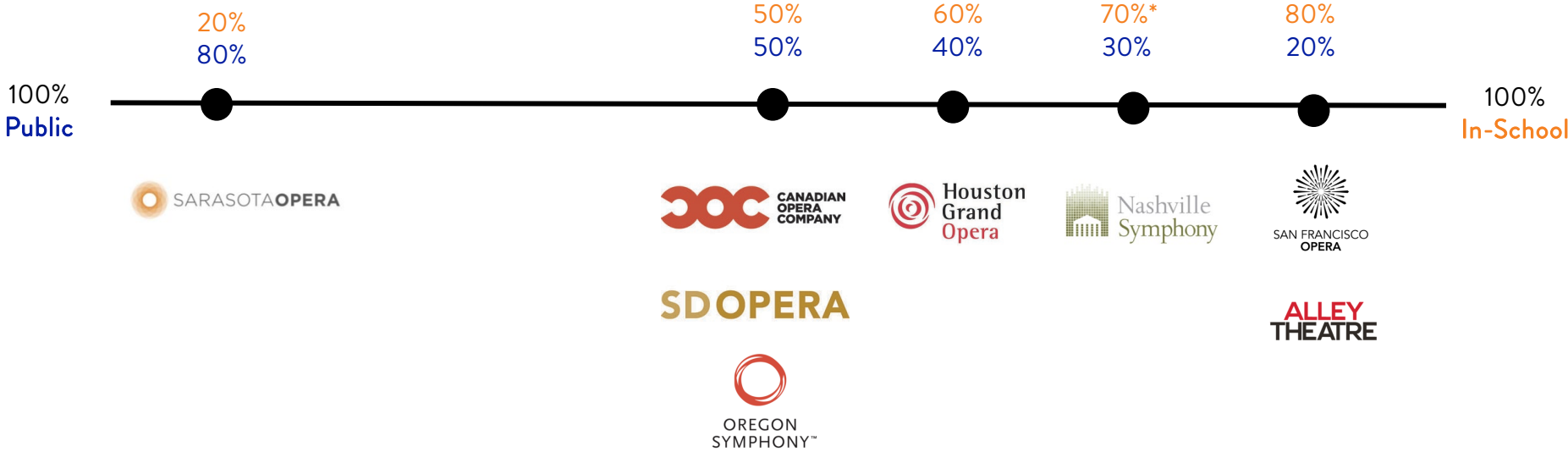
## Mostly Short-Term

“Majority of the outcomes are short term, our logic models map out our long term goals, and at the end of every season we use our rubric system to help evaluate our long-term goals and impact”

“Most of our documentation is short-term.”

“I can’t say that we measure long-term impact.”

# What is Your Budget Allocation Between In-School and Public Programming?



\*Defined as 70% student programming, not necessarily in-school.

# How Are Your Programs Funded? (Aside From For-Fee Programs)

## All Have A Similar Mix Of Individual, Corporate & Foundation

“We have a variety of corporate, foundation, and individual donors that comprise our funding. Most of the funding comes from corporate foundations”

“Support for SDO Education is a mix of all of the usual sources.”

“The in-school programs are mostly funded through foundation grants. Youth Opera funding is from individuals and foundations.”

“We fund our programs by a combo of specific “earmarked” grants, ECE general operating grants and earned income.”

“[We have] more individual giving than corporation. Some grant and corporate funding however. The largest is from foundations - Accelerando has a Mellon grant”

“Programs are funded mainly by donations from local private foundations and individual supporters. The Symphony also dedicates a varying amount of unrestricted funds each year to education programs depending on budget needs”

“Though we do not chase grants and design just to get a grant, our programs can be malleable. For example, PwC was funding one type of program but their guidelines changed and we had for years assessed a new need in the classroom, so we designed the B.E.T.A. Project, which suited their guidelines and our needs and is now an ongoing program.”

## There Are Some Individual Donors Who Fund Only Education, But Most Fund Both

“We have a dedicated donor base for our education programs and while many of these donors also fund our mainstage programming (at a larger amount) we have a few donors who only support our Youth Opera.”

“Most of our funders have specific areas of interest such as art, and or education in which case we are we qualify for both. Some individual donors have very specific interests in what school, what neighborhood, and which program they are interested in funding.”

“There is no cut and dry rule. There are different funders for Education and then there are mainstage funders that like Education as well.”

“Some donors support both education and 'mainstage' with general operating grants; this includes some of our government funders and a small number of our foundation partners. The majority of institutional funders who support our education programs prefer to support our education programs specifically.”



# What, If Anything, Do You Charge For Programs?

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## Most Only Nominal Fees, with Scholarships

### Completely Free

“All of our programming is offered free of charge. Participants receive stipends/scholarships when appropriate, for example many youth/families must make significant sacrifices including lost work opportunities to participate in our programming.”

### Nominal Fees

“During the pandemic, we eliminated all program fees to schools regarding in-school residencies. We only maintain a registration fee, which is fairly nominal, on a sliding scale, and can be waived. This fee helps to cover overhead and administrative costs.”

“Many of our programs are free in both private and public offerings. However, we do charge low rates (and also offer discounts to those rates) for Storybook Opera, Camps, Residencies, Opera to Go!, and Student Performances.”

“Most programs are free, concerts have a small fee, but free for students on federal free and reduced lunch and their chaperones. 65% of the tickets are free and underwritten by our donors. We charge \$3/Kinderkonzerts and \$5/Young People's Concerts and Link Up concerts”

“Student Matinee tickets are \$12.50, but we work with schools to serve as many as we can, so there is always room for subsidy and scholarships.”

## Some Charge More, Especially to Institutions

### Customized Pricing Supported

“We charge different prices for different programs. Residencies are charged according to number of students and classes and can run from \$250 to 3- 4K or more, PD is negotiated per workshop. Shows cost Title 1: \$545/\$865 Non-Title 1: \$595/\$965.”

“As much as possible when working with independent school districts we aim to work “packages” with districts. For instance, one independent school district wanted virtual resources during the pandemic and paid \$90K to us to develop a series of 77 videos for K-2 ELL learning.”

### Opportunity for Earned Revenue Exists

“We rarely charge for programming (less than 5% of the time) and only when we are serving/interacting with a community with means (which is also less than 5% of the time). If the Education department had more capacity, we could develop a significant revenue stream by promoting and charging for services, and a model could easily be developed where earned-income from some programs supported other free programs (the market is there).”