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What Makes Opera Thrive – Learning from Evaluation in the Performing Arts

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What Makes Opera Thrive – Learning from Evaluation in the Performing Arts

Paul Lorton, Jr.²
University of San Francisco

Summary
For not-for-profit cultural enterprises to survive, they need to learn what makes them worthy of their community’s support. For not-for-profit enterprises must secure contributions in addition to the revenues they may generate from their services. This discussion will examine the information contained in the some 500 IRS Form 990 (Return of Organization Exempt From Income Tax) report from organizations that classify their activity as “Opera” and present a matrix of goals, achievement and income mixes to build on earlier efforts at defining success for Opera companies. By systematically exploring what the criteria are, how activity is measured against those criteria and the effect of evaluation on the organization, we expect to help those who wish opera to continue to be performed in learning how a process of consequence of evaluation can do just that.

Introduction
What we learn from evaluation is about our enterprises and ourselves. The importance of evaluation in the performing arts is that it shows us how we value what enriches us and should help us strengthen the valued activity.

1 Illustration from Ivan Ya. Bilibin’s Stage-set for the opera Le Coq d’Or 1909
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American Opera is thriving. In a recent article\textsuperscript{1}, “America’s Opera Boom,” Jonathan Leaf wrote:

The U.S. now has 125 professional opera companies, 60 percent of them launched since 1970, according to the trade group OPERA America. The U.S. has more opera companies than Germany and nearly twice as many as Italy. In the most comprehensive recent study, the National Endowment for the Arts found that between 1982 and 2002, total attendance at live opera performances grew 46 percent.

Annual admissions are now estimated at 20 million, roughly the same attendance as NFL football games (22 million, including playoffs, in 2006–07). In part, this reflects a shift toward seeing opera domestically. “Foreign opera destinations like Salzburg and Glyndebourne are more expensive, and more Americans are staying home—and probably feeling safer for it,” says Richard Gaddes, general director of the Santa Fe Opera in New Mexico.

The current boom is in some contrast to the state of things a few years ago (January 1, 2003) when Anthony Tommasini wrote in the New York Times:

Facing a sinking economy, opera companies and orchestras large and small across the United States report severe deficits and are starting to panic. As the directors of many of these institutions ponder what to do...\textsuperscript{2}

Whether the times are difficult or there is a boom in interest, the success of Opera and the companies producing it needs careful assessment as, unlike many entertainment sources in our society, Opera does not cover its expenses through the box office. While attendance at Opera may be close to that in the NFL, the later does operate as a profitable commercial enterprise while the former not only does not make a profit but depends massively on donations from a committed segment of the public.

The purpose of this exploration is an attempt to rationalize how one might assess success in the performing arts. Specifically, this effort looks at the not-for-profit world of opera companies. For opera companies, especially small companies, measuring achievement against each organization’s criteria for success is what sustains an effort that does not, nor is it designed to, produce a profit. Hence, a first question in looking at these groups must be what are the criteria for success in an enterprise where the traditional bottom line is neither useful nor available as a measure? Not-for-profit enterprises are, by definition, devoid of the profit measure in evaluating their success. So what are the measures?

Using data from the IRS Form 990 (Return of Organization Exempt From Income Tax) submitted by around 500 organizations that characterize themselves as opera, this project brings their stated purposes into correspondence with revenues and activities.

While a shallow and indirect picture of the 500 companies can be drawn vicariously from the Form 990 information, the matrix thus devised can be pursued with the companies (about 12) in the San Francisco Bay Area whose in depth study has already begun. In an earlier effort, “Evaluating Success in Small Opera Companies,” the criteria for success were defined. These revolved around the stated goals and the degree to which those goal were achieved coupled with the scope of public support for the company, both in box office and contributions (no opera company exists on box office revenues alone).


What we learn from this evaluation effort is how to establish a process that can be used to evaluate success in terms that help these organizations make the cultural contribution they seek to make and to thrive.

In Olden Days
In the 18th and 19th centuries, Opera was the multimedia event at which to be seen as well as to attend. Most effort succeeded or failed without direct government subsidy through a collection of investors (other than donors)

In a ground-breaking study of seventeenth century Italian opera production, Bianconi and Walker identify three "models of production" that represent basic norms for the auspices and financing of opera. These presuppose respectively (1) a patron who simply pays for the entertainment; (2) an impresario who may sign on partners but risks his own money; and (3) a "mixed" model in which the impresario enjoys the backing of guarantor. A theater company venturing its own capital on operatic productions obviously represents a fourth and radically different model.

For good or ill, performance art survived because it met a publicly supported need in a world given much choice by the English revolution and the installation of a monarchy with its absolute power tempered. Success was measured in ways with which entrepreneurs would feel at home today.

The advances in technology in the 20th century changed that – in some case improving and in others increasing the competition from other sources of distraction. However, some of the product of these entrepreneurial days in the performance arts survived because of the strength of its message and of the fineness of its art. It demanded preserving.

A performance art does not hang nicely on a wall for all to view. It is immediate and ephemeral. To savor it, it needs to be performed anew and that is the olden days legacy for our modern times – mounting productions where the economic sense for such mounting is gone.

Other Arts
Even today, for most performing arts the model for success or failure is fairly straight-forward and ham fisted – success or failure at the box office. The performing arts thriving today – night clubs and discos for the young professionals, athletic events, large concerts with au currant groups, musicals, plays MTV artifacts, and so on, do survive the old fashioned way – by making money or not.

A fine modern example of this is Baz Luhrmann’s effort to bring his very successful Australian National Opera and PBS production of La Boheme to Broadway. After testing the production which cost $7.5m in San Francisco (where it enjoyed six sell-out weeks), it was moved to Broadway. The BBC reported on their web site:

Glittering start for Baz’s Boheme

Film director Baz Luhrmann’s version of opera La Boheme has hit the New York stage, with an opening night that attracted stars and glamour usually

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reserved for Hollywood premières. Luhrmann, who directed big screen hits Moulin Rouge and Romeo and Juliet, has updated the Puccini work and made it the first classical opera to be staged on Broadway.1

Seven months later, the BBC reported:

La Boheme to close on Broadway

Hollywood director Baz Luhrmann's production of La Boheme is to close on Broadway after running up losses of $6m (£3.5m). Despite positive reviews the show will close on 29 June after a seven-month run. Luhrmann's updating of the Puccini opera, switching the setting from the 1840s to Paris of the 1950s, was seen as a bold production for the largely traditional Broadway.2

While this can seem exceptional, considering the number of performances (it was triple cast so they could play night after night fitting the musical theater model), the losses were probably less than similar productions in large Opera Houses3.

Companies and Goals

Because they are all close to San Francisco and will provide a rich and immediate source of information, the work focuses on the Opera Companies in the immediate San Francisco Bay Area. There are twelve companies picked because of their accessibility for, over the time of this effort, open and candid access will be needed.

San Francisco Lyric Opera (www.sflyricopera.org)

The San Francisco Lyric opera was started by a group of members of the San Francisco opera’s chorus who wanted to get the kind of experience that would move them up the opera ladder from the chorus to solo roles. In 2001 it was placed on a more regular footing and recast to operate as a continuing enterprise ought. At that time the following mission was established:

The Lyric Opera is dedicated to:
• Performance of classical opera at prices that more people can afford.
• Inspiring today's younger generation to become tomorrow's opera patron.
• Providing a venue for young singers to perform.
• Outreach to children.

At every performance, 10% of seats are available, free of charge, to children from the San Francisco Unified School District. All children under 12 are admitted free. Each November performances are held in public schools.

West Bay Opera (www.wbopera.org)

West Bay Opera has enjoyed the second longest existence of any of these companies, younger only than the San Francisco Opera. From the web description:

Under the direction of Maria Holt, David Sloss, and now current General Director José Luis Moscovich, West Bay Opera has strengthened its commitment to the mission first articulated by Henry Holt:

1 “Glittering start for Baz's Boheme” BBC News 9 December 2002
2 “La Boheme to close on Broadway” BBC News 12 June 2003
3 As a last small note here and on the topic – the production was probably a success since Luhrmann said, in the BBC article, “"What drew Catherine Martin and me to mount our production of La Boheme on Broadway was not only the challenge to make Puccini's most popular of operas more accessible to a broader audience, but also the opportunity to live and work in our second home, New York City, and to be part of the Broadway experience."

AEA 07 Session 406 page 4
To offer audiences in the San Francisco Bay Area operatic productions of the highest quality while providing for the professional growth of emerging artists, as well as experienced directors, designers, and other artistic personnel, and maintaining the traditions of community participation and education

Pocket Opera (www.pocketopera.org)

Founded in 1977 by Donald Pippin, the driving force of the company for the past 30 years, the Pocket Opera works very hard on bringing quality, if abbreviated, experience of Opera to all. With Pippin’s fine English translations of most work and a good dose of wit and humor, the concert staged productions entertain, inform, and educate past, present, and future lover of the art form.

From the Company’s web site:

Pocket Opera presents professional performances of operatic works in intimate, intelligible productions at affordable prices.

Donald Pippin’s approach to opera is to tell the story in the clearest manner possible. He once said that there is “a whole category of operas where, if you don’t know the story on the way to the theatre, you won’t know it on the way home, either.” With Pocket Opera presentations it is really possible to know the plot of the opera on the way home. Pippin brings the story to life via his nationally recognized English versions of opera libretti, in which he translates the spirit of the work rather than word by word, with complete fidelity to the composer’s musical intentions.

Pocket Opera is a theatre of the mind and of the heart. Productions are staged with minimal costuming and without sets, using only the few practical props (a bench, a desk, a door, ...) that are essential to convey the story. A few operas, for which staging would add little or nothing to the interpretation of the story, are performed concert style. Through the use of Pippin’s singable translations and narration, through accomplished vocalists and small chamber orchestra, Pocket Opera presents the essence of opera -- affordable, accessible opera of the highest musicality for contemporary audiences.

Professionally trained singers perform for Pocket Opera. Pocket Opera alumni may be found in opera houses around the world.

This last line from the Pocket Opera’s web site is a criterion for success both here, for Opera San Jose and for the San Francisco Opera.

Oakland Opera Theater (www.oaklandopera.org)

Oakland Opera Theater, having begun as “Underworld Opera Company and still filling forms in that name, does unique 20th and 21st century works staged in a small venue so that the intimacy of the theater can magnify the impact of the Opera’s statement. From their web site:

The Oakland Opera Theater is a group of artists who produce newly created operatic works. We address issues relevant to modern urban life. We highlight performers and artists of color. We use modern digital technology to reach beyond the audience seated in the theater. We produce fully staged productions geared to the pace of the 21st century. We seek to make opera more accessible to all ages and cultures and to represent Oakland with a dynamic arts organization that embodies the unique and vital spirit of our local community.

City Concert Opera Orchestra

City Concert Opera Orchestra has a commitment to bring little know, often lost, works to the public in a variety of easily accessed venues with a minimum of the usual trappings of an Opera production. Their web site states:
City Concert Opera Orchestra is the San Francisco Bay Area’s professional orchestra dedicated to presenting rarely-heard opera scores to the public in concert presentations. Since our inception in 2002, we have developed a reputation for high quality work, fiscal economy, and artistic integrity.

By presenting opera in concert format, we expand the operatic repertoire. Without expensive stage crews, costumes, crews, and extended rehearsal periods, CCOO can take a flexible approach to presentation and programming. Quality soloists are unwilling to memorize roles they will never have a chance to perform again. This needlessly deprives opera lovers of the opportunity to hear a full range of operatic possibilities. We have also prepared a number of new editions of hard-to-obtain pieces.

We present some of the highest quality vocalists available, and our work furthers the careers of emerging local talent. Former company singers have won competitions ... All vocalists live locally.

Without the technical requirements of stage scenery and lighting, CCOO’s productions are mobile. Many individuals, especially seniors, are unable or unwilling to travel to San Francisco to hear high quality professional opera, and regional opera companies usually do not have the resources to present works without reducing or eliminating the orchestration.

**Fremont Opera (www.fremontopera.org)**

Fremont Opera has just begun. Their first production, a concert version of *La Bohème* stages with minimal props in front of the full Fremont Symphony Orchestra brings some people who have been involved in opera in the San Francisco bay area for a long time back into the business. Their web site states:

At Fremont Opera, we believe that the human voice is the most powerful and passionate instrument in the world; opera lives because that passion speaks to every generation. We also believe that the fusion of music and drama makes opera a uniquely compelling art form whose many dimensions enrich audiences and artists alike. Opera, done well, will always find its audience; artistic integrity and excellence are keys to our success.

Our mission is to establish a professional, regional opera company based in Fremont, presenting outstanding young artists from the Bay Area and the nation. We want to produce powerful and dramatically innovative opera productions in an intimate setting, developing and educating a new, diverse opera audience through a creative mix of main-stage opera production, chamber opera, lectures, recitals, master classes, and community participation.

Fremont Opera is also dedicated to providing resources and programs for the continuing growth of young singing artists.

**Bay Shore Lyric Opera**

The Bay Shore Lyric Opera presents, often, condensed productions for students in local schools - their Winter *Hansel and Gretel* is 60 minutes long as is their Spring production of Rossini’s *Cenerentola*. Admission to each performance for Children or Adults is $12.00 making the events affordable in both time and money. From their web site:

The Bay Shore Lyric Opera Company is a nonprofit organization based in Saratoga, California, that serves audiences in the Greater Bay Area counties. We are dedicated to bringing grand opera and other performing arts to these communities. BSLO’s mission is to:

- Carry on the wonderful tradition of grand opera by presenting fully staged professional opera productions of the highest artistic quality.
- Make this rich and historic art form accessible to new audiences of all ages through education and outreach programs, especially those serving children and youth.
• Provide opportunities for talented young performers to participate in professional productions that further their artistic careers.
• Strengthen the regional cultural and artistic community through collaborations with a diverse range of performing arts organizations.

Now in its Eleventh year, BSLO has produced eighteen major operas, 162 total performances, staged two plays, and a wide range of musical revues since its inception. We have had a total attendance of 65,000 and have earned an outstanding reputation as one of the best regional opera companies in Northern California. BSLO has also cosponsored performances by the solo recitalist from the company's opera productions.

**Festival Opera (www.festivalopera.com)**

Based in a fairly new performing arts center, the suburban Festival opera company has made well-staged opera available to a community separated by bridges and tunnels from the San Francisco venues. It has prospered from this location and from its expressed purpose:

Now in its second decade, Festival Opera is committed to bringing professional opera productions at affordable prices to residents of San Francisco’s thriving East Bay communities. The third-largest opera company in the Bay Area, Festival Opera is a showcase for talented young artists.

**Townsend Opera Players (www.townsendoperaplayers.com)**

From the TOPS mission statement:

Music is a universal language. Across cultures and centuries music has always been a central part of the human experience. Music nourishes the soul. At Townsend Opera Players, our mission is to feed the soul.

**Livermore Valley Opera (www.livermorevalleyopera.com)**

Livermore Valley Opera (LVO) combines the talents and expertise of professional music, stage and chorus directors, principal singers, musicians, and designers with the dedication and practical abilities of a volunteer board, adult chorus, stage crew, props master, stitchers, and set builders.

Each spring and fall, LVO presents a locally produced, fully-staged opera with orchestra in the renovated and acoustically sound Livermore Valley Performing Arts Center.

Additionally, LVO presents special concerts, events and fund-raisers such as "Dinner and ..." in the winter and "Opera in the Vineyard" in the summer.

Located in the Tri-Valley area about 60 miles east of San Francisco, LVO promotes local talent and attracts outstanding Bay Area singers, directors and conductors.

**Opera San Jose (www.operasj.org)**

Opera San Jose is Irene Dalis’ dream and she has work very hard for more than a quarter of a century to make it a contributing, respectable presence in the area. It is both and makes a unique contribution.

Form their web site:

Opera San José is a professional, regional opera company that is unique in the United States. Maintaining a resident company of principal artists, this company specializes in showcasing the finest young professional singers in the nation. Featuring fresh, new talents in the first years of their careers, Opera San José’s performances are always dramatically stimulating and vocally accomplished.
In addition to mainstage performances, Opera San José maintains extensive educational programs in schools and in the community at large, and offers Previews lectures and Introduction to Opera talks for all mainstage productions.

**San Francisco Opera (sfopera.com)**

This is the big dog in the fight. A venerable and world-class operation with a budget that goes a long way toward sucking the pond dry. On the other hand with a limited season of five months (4 in Fall, One in Spring) performances (the share the War Memorial Opera House with the San Francisco Ballet) and a desire to be before the public all year around (via videos produced in their new state of the art studio) they might contribute a lot toward increasing the publics interest in Opera in all venues.

The brief mission for this $60 million operation does befit the magnitude of the enterprise:

**To be the most exciting force in the opera world**

**Our Mission**

- To present opera performances of the highest international quality available to the widest possible audiences.
- To perpetuate and enrich the operatic art form.
- To be creative and innovative in all aspects of opera.
- To take a leadership role in training, arts education and audience development

**This Mission Demands**

- A diversified, highly committed, qualified Board of Directors working in partnership with an efficient and effective top quality management team and staff.
- Healthy financial performance with a balanced budget and adequate endowment.
- Involvement with our community.
- An image that reflects our artistic quality.

**Some Measures**

Having sketched the orientation of each of the twelve local companies, we can now begin to summarize the foci of their mission and outline what measures will demonstrate whether or not they are successful.

<table>
<thead>
<tr>
<th>Company</th>
<th>Begun</th>
<th>Budget (990-2005)</th>
<th>Young Singers</th>
<th>Afford School Outreach</th>
<th>School Audience</th>
<th>Staged/Concert</th>
<th>Special Works</th>
</tr>
</thead>
<tbody>
<tr>
<td>SF Lyric Opera</td>
<td>2001</td>
<td>207,102</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Staged</td>
</tr>
<tr>
<td>West Bay Opera</td>
<td>1955</td>
<td>465,027</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Staged</td>
</tr>
<tr>
<td>Pocket Opera</td>
<td>1977</td>
<td>323,909</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Concert mixture</td>
</tr>
<tr>
<td>Oakland Opera Theater</td>
<td>1989</td>
<td>291,302</td>
<td>Diverse</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>20/21st</td>
</tr>
<tr>
<td>City Concert Opera Orch.</td>
<td>2002</td>
<td>n/a</td>
<td>Emerging</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Concert Little known</td>
</tr>
<tr>
<td>Fremont Opera</td>
<td>2007</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>Yes</td>
<td>Staged (?)</td>
<td></td>
</tr>
<tr>
<td>Bay Shore Lyric</td>
<td>1996</td>
<td>298,410^2</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Staged</td>
</tr>
<tr>
<td>Festival Opera</td>
<td>1991</td>
<td>779,012</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Staged</td>
</tr>
<tr>
<td>Townsend Opera Players</td>
<td>1982</td>
<td>402,069</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Staged Mixed</td>
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<td>Livermore Valley Opera</td>
<td>1992</td>
<td>106,645</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Mixed</td>
</tr>
<tr>
<td>Opera San Jose</td>
<td>1984</td>
<td>3,689,093</td>
<td>Yes</td>
<td>Yes</td>
<td>regional</td>
<td>Yes</td>
<td>Staged</td>
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<tr>
<td>San Francisco Opera</td>
<td>1923</td>
<td>57,108,025</td>
<td>Partly</td>
<td>Yes</td>
<td>widest</td>
<td>Staged</td>
<td></td>
</tr>
</tbody>
</table>

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1 Reorganized in 2001 – had been in operation some years earlier.
2 Form 990 for 2004
To assess the dimensions outlined above requires measures that assess the progress toward the mission/goals of these organizations with some subtleness. Each of the dimensions tabled above points to a measure:

**Young Singers**

It takes a long time and much work to be able to perform in the large theaters of the world class opera houses. The Metropolitan Opera in New York seats about 4,000 on five levels in front of a stage that could hold a baseball diamond. The San Francisco Opera’s house seats over 3,000 in five main areas. To supply these stages with capable singers requires training and practice – the more on the job the better. Just as the farm clubs in baseball provide a place for young players to hone their craft, many of the opera companies with “encouraging/supporting young singers” in their mission can provide a practice field for young voices to become skilled in singing and in acting, now very much an important part of Opera performance.

For other young singers, training for the profession is not as important as simply singing – some people just “gotta sing.”

**Affordability**

Are the ticket process kept in line with other sources of entertainment for the group one wishes to attract? Is the rational for the ticket prices consistent with the nature of the Opera and the venue? These and similar questions suggest that measuring affordability by ticket prices has to be in context with the audience desired and the venue selected.

Recently, in a way that extends the model of the radio broadcasts of symphony orchestras and opera performances, New York’s Metropolitan Opera has video cast live performances to movie theaters around the world. From Douglas McLennan’s article in the Los Angeles Times:

Which brings us to the Metropolitan Opera’s experiment in simulcasting six operas this season to movie theaters around the world. Filmed operas have been around for quite a while, but they were never like this. The Met has reinvented the form. Or rather, it has created a new art form, judging by the Jan. 13 moviecast of Tan Dun's new opera “The First Emperor.” This venture may be the most significant development in opera since the supertitle. The moviecasts have been a hit. "The Magic Flute," the first of six operas produced for the big screen, was seen in 100 venues worldwide and drew an audience of 30,000, selling 90% of its tickets and selling out at many theaters. The Met (www.metoperafamily.org/metopera) has been signing up more venues for the next opera, Tchaikovsky's "Eugene Onegin," starring Renée Fleming and Dmitri Hvorostovsky (10:30 a.m. Feb. 24). Demand has been so high that encore screenings are planned for "I Puritani (7 p.m. Feb. 13) and "First Emperor" (7 p.m. March 7 and 1:30 p.m. March 11). Meanwhile, Cineplex, Canada’s largest movie-house chain, is considering live performances from Broadway.1

San Francisco Opera has also done this, most recently with *Samson and Delilah* broadcast to AT&T Park, ordinarily the venue for the San Francisco Giants. The Royal Opera House, Covent Garden and the English National Opera have also presented free simulcasts to a broader public in outdoor locales. A big difference was the Met’s experiment in selling tickets to the performances.

**School Outreach**

The most broadly documented effort of any of these companies is their school outreach program. The indicate the degree to which, of the non-economic dimensions, the involvement in

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1 McLennan, Douglas, “Perspective: Singing to the cheep(er) seats.” *Los Angeles Times*, Feb 4, 2007
the schools would be the easiest to assess, the following passages are from three of the listed opera companies sites:

**San Francisco Opera**

For the 2007-8 Season, we will be presenting Mozart’s *The Magic Flute*, to participating schools throughout the Bay Area. These student programs are open to all participating schools. The program fee is $200 per school. The fee includes all necessary preparatory materials and teachers aids, including preview tape or CD, libretto and teacher workshop.

**Opera San Jose**

Opera San José offers a variety of opera experiences designed for students from kindergarten through college. In addition to our 30-minute *What is Opera?* assembly, we offer a *One-Act Opera*, a 45-minute, fully costumed and staged one-act performance. Our 15-session *Let’s Make an Opera!* mentor project (in which a single class creates and produces their own original opera) is available after students have experienced the first two elements in the curriculum. After completing the aforementioned programs, students will better appreciate the *Mainstage Student Matinees*, the final part of our K-12 educational curriculum.

**West Bay Opera**

West Bay Opera’s programs for school children continue to expand. In our elementary school program, professional singers, in costume, and a piano accompanist perform a shortened version of an actual opera which has been specially adapted for children. Opportunities for some students to take part in the performance as actors, stage hands, and chorus members are a regular feature of the program. Preparatory materials are sent to the school in advance of the performance. The teachers can use this material to prepare the children in advance to enhance their understanding and enjoyment of the production.

**Local Audience**

From where does the audience come? People do travel long distances to see particular productions or venues. If one also suggests that broadening the audience, via simulcasts, has some opportunities and consequences for the live art form including the possible that remote or out of town viewers may not convert well into the needed donors, the measure is useful in meeting the goal and in assessing the support base.

**Special Features: Fully Staged or Concert Format, Genre**

There is a lot of talent and many willing to volunteer their services for no or well below market pay. The reward they receive is intangible but the reward for the company that can utilize such contributions is great. The costs associated with any production are mainly in the talent so cost savings have to be balanced between providing adequate staging and the best possible talent for the production. One shift which reflects the flexibility brought on by difficult time, is the replacement of fully staged productions with concert versions.

Genre has to be watched with some care – if one is staging opera than placing Gilbert and Sullivan work into the mix or staging a Broadway musical must be done with attention to the constituency – audience, donors – being served. In their current season, Townsend Opera Players in presenting *Die Fledermaus*, *Porgy & Bess*, *Miss Saigon* and *Hansel & Gretel*. This is a wonderful mix and one can discuss whether each should be called “opera” which raises the issue of rigor in the development of a genre measure.
Some Criteria

Beyond the money dimension most of the criteria for success can be improvement/increases in the measured dimensions. In some cases the criteria has to be inferred from subtle dimensions.

Young Singers
The evaluation criteria for the young singer dimension is where they partake and why

Affordability
Are the ticket prices seen as affordable? Are the concessions (reduced process for students and seniors, children under 12 free) use and used appropriately.

School Outreach
Quantity and quality of the students reaction must be involved in the criteria. The web sites listed above, when this topic was opened as a source of measures also include student reactions. Reading that material does suggest that, while freeform comments – perhaps solicited by a teacher – are useful and rewarding, some system needs to be introduced to be sure the activity involving students is working toward its desired end, whatever that may be.

Local Audience
The geographic source of the patrons is the obvious dimension for this measure. However, a local audience has an additional benefit motioned above – donors are more likely to come from a local audience than an audience traveling to one particular opera or witnessing the production at a remote site to which it has been broadcast.

Special Features: Fully Staged or Concert Format, Genre
Criteria for staging can be set by venue and components – costumes, props and sets combine to stage productions. Criteria for genre must be carefully stated or the appropriateness of the criteria will over shadow the assessment of the dimension.

Simple Goals

The goal is to check to be sure that the company manifests in some evaluated way the mission stated by the company. While all companies seek enough money to continue operations none (save one)

1 have money in their expressed mission. For all, the under lying goal is to produce Opera (the “genre” dimension will examine what that means explicitly). For most this is coupled by a desire to meet a felt need from their communities and from the performance art for its own sake. Each company has some unique contribution to make in these directions. Survival is also unspoken but important and most of these companies have survived reasonably well, most recently from the economic downturn of the early days of this decade.

The evaluation process, begun here, also has some simple goals – to insure that in each organization a clear mission is being realized and that measures to track progress in that direction are explicit. Too often the constant, and often invigorating, need to raise funds blurs focus, especially in small companies, from making sure that a consistent path is followed.

1 Oakland Opera Theater has as an expressed, but not web site written, objective to pay their participants. Interviewed in San Francisco Classical Voice, a web based arts magazine, Oakland Opera Theater cofounder Lori Zook explains, "We pay between 80 and 110 people, as contractors, per year, depending on the productions we're doing. It's a point of pride that none of our singers, musicians, or designers ever works for free." (see /www.sfcv.org/main/mainarchives/main_2_28_06.html)
To revisit an earlier discussion on America’s Opera boom:

Most of the nation’s 125 opera companies are small- to medium-size businesses, organized under the tax code as nonprofits. Even if they have excelled in recent years in developing and promoting new singers and repertory, their directors are often more occupied with fundraising and marketing than with artistic matters. Says Kevin Smith, the Minnesota Opera’s president, "If you go to an OPERA America meeting, the complaints of the company directors focus mostly on things like [finding] money, working with unions, and the trends in subscription sales." Charles MacKay, executive director of the Opera Theatre of Saint Louis, acknowledges, "More time goes into fundraising or thinking about fundraising than anything else."¹

Complex Measures

One of the directions to pursue in this enterprise is to look at reviews of performances – this methods would have the advantage of fitting into the “peer review” domain with which we are so familiar and involve a certain comfort level on the part of the companies – they may not like a review but they appreciate, somewhat, the assessment/evaluation method.

The second avenue is to ascertain how audience-broadening efforts are progressing. This occupies much effort yet the impact of that effort is often not easy to assess even for small companies.

A third area for examination is how the school out-reach programs are working and toward what end. This is effort is easy to monitor but difficult to assess since the outcome is intended to be somewhat long range.

Plans and Prospects

There are two “next steps” in this effort – one directly related to this quest and one related to cementing the gains opera seems to be making in the hearts of the broader community. The ongoing collection of information, agreeing criteria and setting measures is progressing carefully but slowly as distracting semi permanent staff in small companies from daily operations and fund raising is not valued.

The other step is to build the reciprocal relationship that volunteering and assisting from the University can foster so that efforts at assessment come as a natural out-growth of the participating relationship.

Opera is thriving – we think we are on a track to understand what fosters that needed acceptance for this venerable and cherished performance art.

¹ Leaf, Jonathan op cit