

PEOPLE WHO NEED PEOPLE:
THE HR FUNCTION AT NONPROFIT REGIONAL THEATRES

by

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DEDICATION

To my Loving Family – for putting up with me these last few years, for encouraging me to keep going, inspiring me, motivating me, supporting me, being my champion and my cheerleader

To my Parents – for instilling the love of the arts in me from a young age

and

To the entire Performing Arts Industry – I hope you recover and are back in full force so we can enjoy the experience of live theatre again very soon

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ABSTRACT

This capstone studies nonprofit regional theatres and their human resources (HR) departments, or people functions. Nonprofits traditionally have not mirrored for-profit enterprises when it comes to people management. This study explores the challenges theatres encounter and nuances that exist as a nonprofit organization. The research also analyzes the contribution of the HR leader and/or department to the success of the entire organization. Up until now, no study has been uncovered regarding how the HR function is structured in regional nonprofit theatres. Research on human resources in arts organizations is often overlooked or nonexistent. Since the literature was not specific enough to show how HR departments are structured in nonprofit theatres, interviews were conducted with directors of HR and theatre leaders, and with outside experts in the field. Sixteen interviews were conducted, which included staff and leadership from nine regional theatres in the Washington, DC, area. Suggestions are made surrounding what theatres can do if they do not have a dedicated HR staff person. Armed with research from this project, theatre leadership will have the tools to make decisions regarding staffing and the “people function” at their theatres.

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To my colleagues at my apprenticeship, thank you for taking a chance on me and showing me how theatre is done right. I am inspired by a hopeful future and know that you will continue to produce amazing productions after the pandemic ends.

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LIST OF ABBREVIATIONS

AEA	Actor's Equity Association
APAP	Association of Performing Arts Professionals
COO	Chief Operating Officer
CPA	Certified Public Accountant
DC	Washington, D.C.
EDIA	Equity/Diversity/Inclusion/Accessibility
HR	Human Resources
HRM	Human Resources Management
IT	Information Technology
LORT	League of Resident Theatres
SHRM	Society of Human Resources Management
TCG	Theatre Communications Group
US	United States
UK	United Kingdom

CHAPTER 1

INTRODUCTION

People decisions are the ultimate – – perhaps the only – – control of an organization....No organization can do better than the people it has....The yield from the human resource really determines the organization's performance. And that's decided by the basic people decisions: whom we hire and whom we fire; where we place people, and whom we promote.

- Peter Drucker, *Managing the Non-Profit Organization, 1990*

The words of Peter Drucker ring true 30 years after they were written. We can all agree that the people who work at an organization are the most important asset to the organization, whether the organization is a for-profit or nonprofit entity. At a theatre, however, the people are elevated to a critical level due to the fact that theatres create a service – the art – and not a tangible product. Staff, actors, board members and volunteers are what make each theatre different from the next one. All parties need to work collaboratively in order to achieve their goal, from the ushers collecting tickets, to the development staff stuffing envelopes, to the lighting and set designers and the musicians in the pit orchestra. The finished product is miraculous, but none of it would be possible without the right people in the right roles in the organization.

This capstone will study the role of the human resources function in nonprofit regional theaters. The research will define a regional nonprofit theatre, discuss human resources in arts organizations, and describe the different functions that fall under the umbrella of the larger human resources field. Further, this research will show the value of having human resources

professionals on staff in order to be able to tackle confidential personnel issues, to ensure consistency of hiring and termination processes, to oversee training and development, and to provide dedicated resources to the staff.

A quick glance at the websites of various theatres in the Washington, DC, metropolitan area show that many theaters do not have a dedicated HR professional on staff. There are a few HR Directors, and also general administrative staff members with titles ranging from General Manager to Director of Administration, but it can be assumed that this person is also handling legal, facilities, and finance, in addition to recruiting, employee relations, terminations, training and development. This study will test those assumptions as well as research whether theaters and other nonprofits are opening themselves up to potential lawsuits and risk if they don't have well documented and followed policies and procedures in all areas of HR. It will also explore different structures a nonprofit can create to support its staff.

The scope for this study will be limited to regional theatres in the Washington, DC, metropolitan area which have a medium-sized budget and staff size (between \$4 and \$10 million, and a staff of between 20 and 130). Factors in addition to size and budget of the organization will be explored along with other components that contribute to whether or not the theatre has a dedicated HR position or not. Suggestions such as training, certifications, outsourcing, and connecting with peers are discussed for individuals who are in charge of the people in the organization.

CHAPTER 2

METHODOLOGY

This thesis begins with an extensive literature review of peer-reviewed articles, as well as websites, textbooks and handbooks, magazine and newspaper articles, and blog posts regarding the field of human resources, nonprofit organizations and the history of regional theatre. An initial review focused on these subjects independently, and then was expanded to include specific insights on nonprofit arts organizations and nonprofit theatres. Due to a lack of information that specifically related to the human resources function in nonprofit theatres, interviews were then conducted to fill the gap with experts working in the human resources field at local theatres and with others in the arts management field.

It was decided that interviews would be appropriate to discover the necessary information. Focus groups and surveys were not considered, as they would not be the best method of data collection. Individual, one-on-one conversations with the decision makers in each theatre and the individuals performing the HR function on a daily basis took place.

For convenience as well as environmental consistency across the sample, the study focused on nonprofit professional theaters within the Washington, DC area. In the Washington, DC area, 99 professional theatres are listed on theatreWashington's website as of October 2020 (theatreWashington 2020). To focus on organizations with significant human resource needs, only theaters with an annual operating budget above \$4 million (based on tax information available on Guidestar in 2018, which was the latest year available) were considered in the group (Guidestar 2020). The size of the staff ranged from 21 to 132.

Interviews were conducted with Managing Directors, Directors of HR, Directors of Management and Administration, General Managers and Assistant General Managers, Arts Consultants, Professors, and other thought leaders. (See Appendix A for a list of theatres and experts consulted.) The interview questions included a combination of “get to know you” type questions, inquiries about the educational and work background of each interviewee, and questions surrounding their role in their organization and how their organization is structured. The interview questions were adjusted as the interviews moved forward; some questions that were appropriate for a Director of HR, for example, were not appropriate for a Managing Director of a theatre. This list of questions was specific for each audience, and the findings nicely supplemented the literature.

The initial interview participant list was not challenging to assemble, but kept growing after research began. Interviewees were selected via different connections – through a mentorship with theatreWashington, with alumni from the American University Arts Management master’s program, former colleagues from the author’s apprenticeship, and others in the industry and the author’s master’s program. The intention of the interviews was to obtain a well-rounded view of working in a theatre, and how the people who work there are hired, compensated, trained and let go, among other things. Interviewees included a person responsible for the box office/audience services function, individuals ranging from two years of experience all the way up to forty years in leadership positions, and employees who have been in their roles from one to ten years. In addition, leaders and consultants in the field of arts management were interviewed to gain a perspective from a few who work outside a theatre on a daily basis.

CHAPTER 3

LITERATURE REVIEW

Introduction

This literature review will explore the wide variety of information available on nonprofit organizations and their human resources practices and procedures. Where available, specific human resources practices in nonprofit arts organizations and nonprofit theatres will be included. Literature is widely available on nonprofit organizations and on how to manage human resources in nonprofits, but regional theatres have different needs and different structures, which will be discussed.

The Regional Nonprofit Professional Theatre

No study regarding the DC theatre landscape would be complete without a discussion of the birth of the regional nonprofit theatre. Zelda Fichandler was a founding leader of the regional theatre model in the 1950's, and together with her husband, created a new version of theatre – first the resident theatre, then the regional nonprofit theatre. Theatre creators had to teach themselves a new way of putting on a show, and each theatre subsequently came up with their own individual style. In an article in *American Theatre* magazine, Ms. Fichandler describes the resident theatre as a “fiscal burden” and also stated that the “aesthetic excellence” was shifting away from NYC. She mentions, “A new play with a good press and a good word of mouth means lines at the box office and a feather in our caps” and discussed the pain of receiving grants in the early years that were then not renewed.

In an article dated January, 30, 1986 in *American Theatre* magazine, Fichandler stated:

“Our institutional structures are necessary to us. Compartmentalization, specialization, clear and clean procedures and good personnel policies, a strong middle as well as top management structure, the best of promotional and development techniques, budgets that define and defend values and provide guidelines for growth as well as survival are all absolutely essential to us.” (American Theatre 1986)

Taking care of people, through policies, procedures, training and development, was clearly important to Ms. Fichandler, and that is how she built Arena Stage from the ground up.

In the Washington, DC, metro area there are 99 professional nonprofit theatres (theatreWashington website) but this research will be focused on theatres that fall into the range of \$4 million to \$26 million (2018 revenue) per Guidestar, a database which shows snapshots on nonprofit organizations and their finances and operations.

Regional theatres are significantly different from Broadway, which is primarily a for-profit commercial enterprise. Regional theatres are non-commercial, and when they expanded across the U.S. the biggest obstacle to regional theater being successful was financial. Regional theatre is mostly different from commercial or Broadway theatre because it can enlarge audiences, cultivate new playwrights and directors, introduce up-and-coming actors, and connect to a community in a way that touring Broadway cannot. In addition, a huge benefit to regional theatre is the diversity of the audience and donors (Conte and Langley 2007).

Chapter 5 in Conte and Langley’s textbook is a discussion of the history of the nonprofit theater in America. The chapter walks the reader through the birth of the regional theater in America, from the Ford Foundation’s \$60-million initiative to jump start the growth of theater arts, to the creation of the Theatre Communications Group (TCG) and the League of Resident Theatres (LORT), to the official formalized organization of the “regional theatre.” The authors also discuss the benefits of forming a nonprofit professional theatre, some of which include the

connection to the community, diversity and relationships with local playwrights and directors. In addition, the chapter explores Boards of Directors, Mission Statements, and equity contracts.

LORT is the largest professional theatre association in the U.S., and LORT theatres “collectively issue more Equity contracts to actors than Broadway and commercial tours combined.” If a nonprofit theater is a member of LORT, it is generally assumed to be of a high caliber of work, with a high percentage of actors who are members of Actor’s Equity Association (AEA). The LORT website lists each one of the 75 member theatres around the US including DC (LORT 2020).

A report written by Paul DiMaggio in 1987 explains why the 1960’s and 1970’s were such an era of growth in the nonprofit regional theatre world:

“During the last two decades, however, full time administrative roles have become more prominent in America’s arts organizations, and their functions have become more formalized. Two factors have led to this development: the internal growth of the organization and the increased complexity of its external environment” (DiMaggio 1987).

The Field of Human Resources Management

Human Resources Management (HRM) is defined as: “the design of formal systems in an organization to ensure the effective use of employees’ knowledge, skills, abilities, and other characteristics (KSAOCs) to accomplish organizational goals” (Pynes, 2009). Anything and everything having to do with employees in a company or organization could be described as human resources management, from how they are hired, to how they are compensated, to the way they are managed on a daily basis, to how they are trained.

The largest professional membership organization for human resources professionals is The Society for Human Resources Management (SHRM), with over 300,000 members in 165 countries (SHRM 2020). Their website is dedicated to sharing information on membership, professional certification, policy and advocacy for the profession, research and training and development. The website includes best practices recommendations for human resources professionals in all areas, including recruiting, training and development, leadership, and much more. Most of the information contained on their website is focused on for-profit companies, and not specific to the nonprofit arts world.

Human Resources as a profession is relatively new. Human Resources as a field has grown in the past 20-30 years. In the 1980's and before it was called personnel management, but now is more strategic in nature. The latest terminology is now called "People Operations" and is starting to replace the term human resources.

Human Resources in Nonprofit Organizations

The study of Human Resources function in nonprofit organizations has evolved significantly over the last 20-40 years. The publication of books and research by DiMaggio (1987), Conte and Langley (2007), Pynes (2013), Byrnes (2015), Word and Sowa (2017) and Macdonald (2017) have all helped nonprofit organizations of any size understand how to implement and manage their human resources.

Ridder and McCandless authored three pieces of research having to do with HR in nonprofit organizations in the last decade. In 2010 they wrote a study that focused specifically on the architecture of HR in nonprofit organizations, discussing four different methodologies to how human resources can be approached. (Ridder and McCandless 2010). An HR architecture is

defined as the design of HR systems and practices. In this article, it was stressed that human resources practices and procedures in an organization are important in developing employees and recruiting them, stating that employees are valuable resources that “contribute to the success of the organization.” The authors reminded the reader that employees have different needs and motivations, compared the nonprofit sector to the for-profit sector. This article is important because there is agreement that in some nonprofit organizations the state of the human resources function is inadequate. In addition, it states that there is a continuum of HR support from organization to organization, ranging from “single and isolated HR practices” to a higher emphasis on the HR function with “consistent and coherent practices.” Even though it was not focused on arts organizations or theatres, the study laid the groundwork for a 2011 article that connected an organization’s internal procedures with its external environment (Ridder and McCandless 2011). The 2011 study suggested that HR had been a neglected topic in the nonprofit literature, and the authors drew the conclusion that there was a shift happening in nonprofits towards a strategic orientation of HR configuration. The third piece of research by Ridder and McCandless in 2017 suggests that nonprofit organizations complete a diagnosis of their current HR architecture, which can then provide the basis for the decision to switch to a different HR configuration (Ridder and McCandless 2017).

Even though it does not discuss arts organizations and theatres at all, Macdonald’s book *21st Century Skills for Non-Profit Managers: A Practical Guide on Leadership and Management* (2017) was influential to this research. Even though this handbook-style publication discusses organizations based in the UK, it does mention a few times the differences between UK-based organizations and US-based organizations. One chapter walks through all of the different areas of HR management, and applies the situations to nonprofits specifically. These areas include

sourcing, recruiting and hiring, performance management, discipline and terminations, teamwork and staff motivation, and training and development. The author also discusses the importance of volunteers in a nonprofit workforce. At the beginning of the chapter, Macdonald makes a sweeping generalization that all large organizations should have HR departments and all small organizations probably do not have HR departments. This recommendation is difficult to implement because the industry defines “large” and “small” differently. Macdonald admits to challenges with funding and budgets, but he also concludes that “even in smaller organizations, the appropriate HR structure must be set up, otherwise the staff will not flourish or remain” (MacDonald 2017).

Human Resources in Nonprofit Arts Organizations

A study by NetGain Partners Inc. in the early 2000’s explored best practices in Human Resource Management in the cultural sector in Canada (NetGain Partners n.d.). The study states that “the basic principles of effective human resources management apply to any organization, regardless of sector.” This is significant because even though the nonprofit and for profit sectors have different structures and organizational charts, people still need to be managed. HR is about human relationships, and people exist in every business regardless of its tax status. The study explores not whether an organization had a dedicated HR staff person as a part of their full time staff, but rather at whether the organization had a leader and/or an outlook that was “HR-oriented,” referring to the effectiveness of the manager’s success in the organization.

In addition, this study appropriately acknowledges the difficulty arts and cultural organizations have finding money in their budgets for competitive salaries. Yet the authors state that this did not stand in the way of HR-oriented managers finding creative ways to reward and

recognize their outstanding staff. HR-oriented managers find a way to make this happen and they value and respect the contributions of their staff.

Other important findings include the inclination of HR-oriented managers to:

- Empower their staff
- Be proactive in communicating with their staff
- Include training and development for their staff in their budget
- Ensure that performance management systems are in place
- Have systematic procedures in place for recruitment and terminations
- Spot high-potential performers and develop them towards promotions or other goals
- Mix administrative and artistic staff in meetings
- Know when to rely on board members and other outside lawyers/consultants when necessary

A recent article in the journal *Issues of Human Resource Management* focuses on the HR function in a nonprofit arts and culture organization, outlining 14 functional areas of human resources in detail (Parsehyan 2017). The article discusses how each area of HR contributes to the organizational culture and the overall efficiency of the organization. Even though this study examined an organization with 800 people (much larger than the staff of most regional theatres in the U.S.), the article mentions multiple times the importance of the HR function helping with alignment to organizational goals and the benefits of HR management. Regardless of where they work, employees respond the same way to the way they are treated, whether they work at an arts organization or any nonprofit.

Organizational Structure

In multiple sources, there is an assumption that HR departments only exist in large organizations (Conte and Langley 2007, Parsehyan 2017, Macdonald 2017). For example, in Conte and Langley's book *Theatre Management*, a sample organizational chart does not include human resources as a department in a theatre, even in a fictitious organization with a budget over \$10 million. Theatre Communications Group (TCG) is a well-established, national organization that publishes an annual report of theatre facts. In their most recent report entitled *TCG Facts 2018*, it is interesting to note that human resources is not listed as a separate department or as a payroll expense category (Theatre Communications Group 2019). Only administrative, general management, development, marketing, education, IT/web, front of house, and finance are listed as categories. This annual report is a snapshot of the finances and operations of professional nonprofit theaters in the US. It provides detailed data regarding earned income, contributed income, attendance, budgets, expenses, and trends in the nonprofit theater industry. The report does not, however, go into detail regarding other areas of personnel or human resources management such as recruiting, performance evaluations, employee relations and training and development. This report is important to the body of research as it paints a picture of the different sizes of nonprofit theaters in the US., the number of theaters at each income level, and their budgets.

In an article focusing specifically on the theatre discipline by Rhine in 2006, "Personnel Management" was included in the list of Theater Manager categories, which included Hiring, Job Analysis/Structure, Conflict Resolution and more (Rhine 2006). In another section of the article, Human Resources was included as a department in a theatre alongside Marketing,

Development and Fiscal Management, which implies that having an HR department is equally as important as the other areas in a theater.

Mesch states that HR is a mostly administrative function and that there is a lack of professionalism in nonprofit organizations (Mesch 2010). Mesch agrees that employees are their organization's greatest asset, and she predicts in 2010 that nonprofits will need to compete for resources and become more strategic in nature if they want to survive.

The Unusual Structure of Nonprofit Theatres and the Different Classifications of Their Staff

Theatres are odd structurally, compared to other types of nonprofits, as their human resources are usually divided between multiple categories: full time staff, part time staff, independent contractors, volunteers and outsourced staff (Rosewall 2014). In her book *Arts Management – Uniting Arts and Audiences in the 21st Century*, Rosewall devotes an entire chapter to human resources in the arts organization. In this chapter she focuses on the four different types of people who might work in an arts organization: 1) regular, paid full time staff 2) contracted staff, such as a stage manager for a particular production 3) outsourced staff such as a consultant or accountant, and 4) volunteers. The chapter lays out the advantages and disadvantages of an arts organization having each type of worker, and is important to the research because it stresses the need for performance evaluations for all staff, including volunteers.

Multiple pieces of literature contribute to the concept of the strained relationship between volunteers and staff (Byrnes 2015, Siebert and Wilson 2013). In addition, sometimes full-time employees feel threatened by interns, and theater leadership forget that apprentices and interns are valuable (Conte and Langley 2007) and contribute a significant amount to the organization,

even while being paid less or not at all. Interns, apprentices and volunteers should be included in processes such as training, feedback, performance management, and two-way communications, just like employees. There should be a process for recruiting and screening volunteers, and a well-managed volunteer system leads to a healthy organization (Byrnes 2015). Many articles point to the fact that volunteers, interns, apprentices, ushers and other unusual employees should be managed in addition to full time staff. Both Conte and Langley (2007) and Siebert and Wilson (2013) agree that these novices and volunteers are useful in the theatre industry, and could be a good entry point for those interested in pursuing a career in the theatre.

Having a separate person to coordinate volunteers (Byrnes 2015, Drucker 1990) is a concept that is only embraced by few theaters. However, this role contributes significantly to the satisfaction of the volunteers, which in turn contributes to happy employees and patrons.

Even though employees sometimes feel threatened by interns (Conte and Langley 2007), interns can make a valuable contribution to nonprofit arts organizations. Interns can bring youth and creativity to team meetings and brainstorming sessions, give another perspective to the marketing department, and introduce the nonprofit to other students and professors for networking and partnership purposes. A magazine article in *Inc.* states that all people who work at nonprofits (paid staff and volunteers alike) are important and have an impact on the group performance. Human resources decisions are connected to the mission and values of the nonprofit (Inc.com). Creative Business Resources (CBR), a consulting firm and HR outsourcing company, agree that “nonprofits should implement a screening process designed to recruit volunteers” (Creative Business Resources 2016) and that “other aspects of performance management, such as training, feedback, and clear communications of expectations, are important for volunteers and employees alike” (Creative Business Resources 2016). Bingle

(2013) and Drucker (1990) agree that just like paid staff, organizations must provide volunteers with supervision and management, clear assignments, tools to succeed, and communicated goals.

A blog published by the *Small Business Chronicle* (part of the *Houston Chronicle*) outlines specific challenges faced by nonprofit organizations in different areas of HR. This article brings up two important points: 1) the fact that volunteers should be managed diligently and expectations need to be managed with volunteers in the workforce at a nonprofit, and 2) nonprofits face a challenge with compensation since they rely on grants and donations to meet their budget (Bradley 2020). These points seem to be repeated in the literature.

Another viewpoint regarding interns and apprentices by Haunschild is that being a temporary worker may restrict the development of the workplace and employees' commitment to the organization (Haunschild 2003). An included case study about a theater in Germany discusses how their human resources are managed, specifically casting and recruitment, feedback and performance reviews, and training and development. One of the conclusions the author makes is that temporary work situations might hinder the development of community and the commitment levels of employees, which could also be applicable to the situations of interns, apprentices and other part-time, temporary staff such as box office staff and teaching artists. In addition, the author states that recruitment of actors and artists is based on "who you know" and connections in the industry, which could also be similar for administrative staff. Even though the article only discusses the artistic side of theatre, and focuses on one repertory theatre in Germany, it specifically highlights theatre personnel in the 21st century and warns theatre management of the risks of a non-permanent workforce.

Finally, it is important to note that no study was discovered that deals with service employees who are customer-facing, such as box office. These types of employees have a high

level of contact with visitors and patrons, and are directly correlated with a positive customer quality experience (Hausmann 2013). In conclusion, tensions between full-time staff and volunteers in the workplace at an arts organization are common and can hinder the efficiency of a nonprofit (Hausmann 2013).

To summarize, due to the many classifications of employees, such as paid vs. volunteer, full time vs. part time, and temporary vs. permanent, theatres are structured slightly differently from other nonprofit organizations, which makes it more complicated to manage the people who work there. This makes it all the more important to have the proper management structure and supervision in place so the employees are looked after, hired, trained, and compensated properly.

Human Resources Responsibilities, Processes and Procedures

A significant portion of the literature uncovered were “how-to” manuals and books outlining standard human resources processes and procedures – such as recruiting, onboarding, performance evaluations and terminations – and how to implement them in an organization. Within this literature, sub-processes are mentioned that are considered “best practices” such as having a standard job application, hiring from within before going external, checking references before making an offer, and more. Below a few areas of HR will be examined.

Recruiting/Talent Acquisition

The organization Nonprofit HR stated that “most nonprofits have no talent acquisition strategy and no plans to change the way they recruit talent” (Nonprofit HR 2017). Many nonprofits seem to be “coping” with the recruitment challenges they face and say that they are “finding employees with the commitment, qualifications and willingness to work that they

need” (Salamon and Geller 2007). This approach is consistent with other studies that concluded that in the area of talent acquisition, theatres are “getting by” but not working up to their potential in the area of recruiting. Haunschild (2003) mentions that recruitment is based on personal ties from the professional theatre community and therefore, there may not be much of an effort made to recruit according to best practices.

Conte and Langley (2007), Byrnes (2015) and Parsehyan (2017) all mention the tendency in arts organizations to first hire from within and then look externally. Conte and Langley specifically wondered why certain positions are filled before being posted externally and may not be announced externally at all due to networking or word of mouth within the industry (Conte and Langley 2007). A risk in not using formal recruiting processes and procedures is that an arts organization may end up hiring people passionate about the art, but lacking the experience and training needed to be fully effective in their position (Byrnes 2014). In addition, if positions are only filled with internal candidates or through industry contacts, there will not be much diversity at that organization. DiMaggio shares these concerns and predicts that all arts organizations will face challenges in recruitment and retention in the future (Dimaggio 1987).

Performance Appraisals

The concept of performance appraisals in theatres was explored by Haunschild (2003) in his case study of German theatres, and he found no formal appraisal systems in theatres. Byrnes’ study in 2015 also discussed the fact that these rarely exist in arts organizations, which leads the reader to believe that after 12 years there is much room for improvement in the area of performance management. Conte and Langley believed that all employees should get

performance reviews, not just full-time staff (Conte and Langley 2007) which would most likely only take place if there was an HR staff person administering this process.

Compensation

The assumption that nonprofits have limited financial resources is widely known (Parsehyan 2017, Byrnes 2015, Ridder and McCandless 2010). However, even though resources are limited, nonprofit organizations can still have performance-based merit increases and bonuses within their budget range. Byrnes states that the arts and nonprofit job marketplaces do not always provide the level of compensation and benefits many people are seeking, especially in the managerial or administrative area (Byrnes 2014). The ability to obtain funding, both contributed and earned, affects the ability to pay competitive wages to employees in nonprofits. In addition, this lack of funding negatively impacts all areas within the nonprofit, including compensation. A blog from Creative Business Resources (CBR), a nonprofit HR outsourcing organization, also suggests that employees in nonprofits will accept a lower salary in exchange for training and development opportunities or work/life balance (Assistant, Admin 2016).

Regarding multiple areas within Human Resource Management, Conte and Langley's 2007 book, *Theatre Management – Producing and Managing the Performing Arts*, was instrumental to this research. Chapter 3 of this publication is entitled: "Personnel for the Theatre" was written specifically for managers of theatres in the U.S. This manual discusses many of the human resources concepts described above, such as the fact that all theater employees should get performance reviews, all new hires should have their references checked, and standard employment applications should be used in the theatre industry. It also discusses hiring and recruiting in detail, and includes information on hiring and managing volunteers, interns and

apprentices, which is a model unique to the theatre industry (Conte and Langley 2007). On the flip side, Conte and Langley made a generalization that hiring is best when done by department heads, not with a centralized HR manager.

Contribution of the HR Department and Strategic HR Management to the Success and Mission of the Organization, Discussion of Culture

Organizational culture can be explained and defined in many ways – it can be the type of people hired, the way employees embrace office policies and politics, or it can be how employees interact with each other. Parsehyan (2017) states that HR plays a “crucial role in the establishment and enhancement” of organizational culture. If employees are managed properly, HR can assist with decreasing turnover and increasing motivation of employees, among other benefits.

Dave Ulrich agrees that HR contributes to organizational excellence, and that HR should take the lead in culture change programs and with appraisal systems (Ulrich 1998). Even though Ulrich was not specifically discussing nonprofit arts organizations but rather the for-profit sector, he outlines the case for experienced and professional HR staff in any company or organization, whether for-profit, nonprofit or government. Suggestions such as partnering with senior management, being a champion for employees, embracing technology, streamlining operations, and HR being a change agent are all steps organizations can take to bring their HR team and the performance of the HR function to the next level.

Several studies point to the fact that employees have a shared responsibility to the mission of the organization. Employees are a valuable resource and they contribute widely to the success of the organization (Ridder and McCandless 2010). This concept of “Value-Driven

HRM” has been repeated in multiple studies. Akingbola and van den Berg (2019) looked at employee engagement, commitment and job satisfaction in nonprofit organizations. This article discussed the shared value and shared mission of employees at a nonprofit, and the importance of them being engaged. If employees are not engaged, then it will be challenging for them to assist in fulfilling the mission, and overall organizational commitment will decrease. Akingbola and van den Berg also point in the direction of other relevant research: “Nonprofit employees are known to forego competitive wages in exchange for the social purpose and the public-good characteristics of their job” (Frank, 1996; Rose-Ackerman, 1996) HR management can support and increase employee motivations (Parsehyan 2017).

Dedicated HR Staff Person or Not? Formalized HR Department/Structure or Not?

There are multiple studies agreeing that a dedicated HR staff person in a nonprofit theatre is beneficial to the organization. For example, an individual in an HR-only role could assist with determining market rates for compensation. And, an HR staff person can assist with seeing the “big picture” goals of the organization, and considerations for staffing at the organization (Bingle, Meyer, Taylor 2013).

Contrary to Bingle and associates, Guo (2011) states that organizations that do not have a dedicated HR staff are more likely to implement strategic HRM practices; possibly because without a dedicated HR staff the top executives implement strategic HR decisions. Guo discusses strategic HR management in nonprofits, but his research dives into the connection between strategic HR practices and technological savvy, organizational size and the use of independent contractors. The article concludes that having dedicated HR staff is negatively associated with the adoption of strategic HRM practices, possibly due to the fact that HR staff in organizations

may be more administrative in nature. In addition, Guo et al conclude that HR staff should be included in decision making if the organizations want to adopt more strategic HR practices. Even though this particular study only focuses on one survey of 229 organizations in one county in Arizona, it is interesting to note that a dedicated HR staff person in a nonprofit may not always translate to strategic HR practices.

Macdonald agrees with Guo in his book, *21st Century Skills for Non-Profit Managers*. In chapter 9, Macdonald states that “HR information, policies and forms can all be easily bought online.” These online resources are usually created by a reputable person or company and are many times free, negating the need for a nonprofit organization to hire someone into an HR-only role. Macdonald states that regardless of whether or not a nonprofit organization has a staff person focusing solely on HR, the appropriate HR structures need to be in place in order to support its staff.

Theatre Communications Group, Inc. (TCG) published an article focusing on Human Resources in 2002 (Nolan and Rice 2002). This article was structured like a handbook for theaters considering adding a dedicated HR staff person to their roster. Through surveys with 12 theaters, the authors were able to provide suggestions for theaters who do not have a dedicated HR resource, and additional ideas for all theaters. The article focused on hiring and interviews, terminations and exit interviews, performance evaluations and communications and management concepts. It gave sample behavioral interview questions and sample exit interview questions as well. This article was a welcome addition to the literature, as it discusses HR specifically for theatres, and it clearly outlines the case for a theatre to have a dedicated HR professional on staff.

Danielle Mohlman in an article in *American Theatre* magazine makes a strong case for theatres having an HR department (Mohlman 2019). The author interviewed five directors of HR at five different theatres across the country, including one here in Washington, DC. The common themes that arose include not just answering questions from staff, but also being an advocate for staff, and HR being a place where staff can find support, creating policies and procedures, and most importantly ensuring compliance with federal, state and local laws. Most importantly, this article discusses the quality impact a dedicated HR person can have on the art an organization delivers, and makes the connection between happy employees and happy artists.

Another theatre-industry publication, *Howlround Theatre Commons*, also wrote an eye-opening article focusing on artists who are also parents, and it concluded that since many performing arts organizations have an “absence of a dedicated onsite HR person who could offer advice and guidance,” sadly parent-artists must learn how to advocate for themselves when faced with obstacles such as parental leave, childcare and lactation spaces for nursing parents. These are problems that all working mothers face, regardless of what industry they are working in and whether or not their employer is for-profit or non-profit.

In *The Nonprofit Human Resource Management Handbook*, Chapter 6 focuses on Recruitment and Selection for Nonprofit Organizations. In this chapter, Rikki Abzug (2017) concludes that specifically regarding recruiting, social networks inside and outside of the theatre industry are particularly important when it comes to filling positions. Many positions are filled with internal candidates or with candidates current employees know. However, the only way to have a diverse candidate pool and therefore a diverse workforce, is to have an independent viewpoint involved in making hiring decisions. Abzug summarizes a number of studies that stressed “having HR specialists on board can better focus recruitment efforts.” In these same

studies it was mentioned that some Canadian nonprofits gave preferential treatment to internal applicants vs. external candidates – a best practice also used in the for-profit world. Therefore, if an organization does not have a dedicated HR person or recruiter on staff, or if the volume of hiring is low, then the nonprofit should invest in a consultant up front to create their recruiting policies and procedures. Regardless of whether the nonprofit hired from within or externally, most nonprofits in a study by Ban et al (2003) were satisfied with their recruiting efforts.

In *Management and the Arts*, William J. Byrnes (2015) makes a convincing case for a dedicated HR staff person in a chapter focused on human resources. One angle he takes is that arts managers must be constantly up to date on employment laws as they are ever changing. He advocates for reference checks, employment applications and using behavioral interviewing techniques during recruiting procedures in order to decrease the amount of recruitment related litigation and to reduce the likelihood of hiring the wrong employee. He states that having a dedicated HR staff person, team or department helps with the recruiting process and other areas such as benefits, performance management and training and development.

Conclusion

Overall, the majority of the literature uncovered were handbook-style textbooks on human resources best practices in nonprofit organizations. Since nonprofit theatres are unique in the make-up of their personnel, and they have a combination of part-time and full-time staff, seasonal hires, volunteers and temporary hires, the HR handbooks and textbooks for all nonprofits do not always apply to arts organizations nor regional theatres.

The textbooks and articles on nonprofit human resources uncovered were strong on details such as the different functional areas of human resources – for example, recruiting,

onboarding, performance management, training and development, compensation and benefits, terminations, and other areas. Some of the literature was old or outdated, and an effort was made to separate the newer research from the older research. As admitted by Ridder and Baluch (2017), there seems to be a hole in the research regarding the connectivity between HR and nonprofits: “it remains puzzling that there is so little research on strategic human resources management (SHRM) in the nonprofit field....” In addition, there is even less research on HR within arts organizations, and HR within nonprofit regional theatres. Even with this missing research, there is evidence that an arts organization would be better off with a dedicated HR professional on staff. The next section of this thesis will turn to interviews with theatre leaders and experts who can shed some light on this area, and fill in the missing links of the research.

CHAPTER 4

FINDINGS

Introduction

The interviews conducted with Managing Directors, Directors of HR, General Managers and other leaders proved how different management style and organizational structure is from theatre to theatre. The interviewees shared information and insights on the history of their organization, their leadership style and challenges they are facing in today's world. A consistent theme throughout these conversations is a renewed focus on diversity, equity, inclusion and accessibility, with many theatres considering adding headcount to concentrate on these important initiatives. Since the #MeToo movement and the recent racial injustices amplified due to Covid-19, and the 2020 Black Lives Matter movement, theatres have had to adjust their mindset. Managing Directors and theatre leadership are starting to think about shifting the HR function from administrative to advisory. A few of the theatres interviewed contracted with an outside organization called ArtEquity to provide bias training to their staff. Initiatives such as these take staff time away from other tasks but are nevertheless just as important. As a result of the "We See You White American Theatre" statement released in June 2020 (We See You W.A.T. 2020) anti-racism and equity training has become a higher priority, as has the idea of creating a Chief Diversity Officer role at the theatre.

Historically Administrative Nature of HR

After interviewing theatre leadership and individuals in the HR roles in many DC theatres, it became clear that the theatres have a range in the way they do business. Some have more formal structures, and others are more informal regarding the HR function. The literature uncovered that HR in nonprofit organizations traditionally has been relaxed and simple, without

many processes and procedures. Traditionally HR has been the department that planned the holiday party and summer barbeque and collected new hire paperwork. They are also the group who hand employees their paychecks and help them register for benefits. With the view of the HR function being more transactional, HR in theatres does not mirror the for-profit side at all. Mr. Sweibel, an Arts and Culture consultant who has worked for 30 years with nonprofit theatres across the country, stated that many of the HR systems and procedures at arts organizations are “perfunctory,” meaning that they are built to protect the organization and provide a system of support, but they are not designed to actively support the staff and engage in “thoughtful modern-day staff development.” One of the Directors of HR interviewed stated that she was mostly reactive, and didn’t have time during a typical work week to be strategic and do long-term HR planning and projects. This once again shows the prevailing approach of informality at nonprofit arts organizations and a low level of investment in its people.

Training and Education

Most professionals working in an HR role at theatres in the DC area have not had any formal HR training or education. A few of the professionals interviewed had a business or theatre management degree, and all had at least a bachelor's degree. Out of the eight interviews with the Directors of HR, General Managers, and Directors of Finance and Administration, none of them had gone to school (undergraduate or graduate) for human resources, including the directors who spent 100% of their time in an HR role. All of the learning in the area of human resources had been absorbed “on the job.” Even though one can learn a lot by doing, it is a risk to the theatre if the person handling HR is not trained properly in areas such as workers compensation laws, and legal vs. illegal interview questions, for example. To compensate for this deficit, many of the interviewees have taken classes, seminars and webinars that teach specific subjects within HR,

specifically in tricky areas of the law such as employment laws and compliance. None of the staff interviewed had an HR certification through SHRM – the gold standard of the HR industry – but one managing Director mentioned that he was thinking of getting a certification for his General Manager.

Differences in Organizational Structure and Titles

Out of all the interviews conducted, the General Manager is the title that was most common in the DC theatre marketplace for the individual handling HR responsibilities. Most of the time this managerial job title is part of the senior staff of the theatre, reporting directly to the Managing or Executive Director. If the theatre does not have a standalone HR Director or Manager, the General Manager assumes these duties. Based on the interviews, the percentage of time the General Managers perform HR responsibilities during a typical week are as follows:

Table 1 Theatres by Percentage of HR for General Managers

Theatre A	25%
Theatre B	30%
Theatre C	50%

The fact that these percentages range from 25% to 50% leads us to believe that the HR function is not prioritized over the other duties of the General Manager, such as finance and IT administration. If one was to include the Director of Finance and Administration and the Associate Director of HR and Management titles at two additional theatres in our analysis, the percentages increase for one, but stay in the range of the General Managers for the other:

Table 2 Theatres by Percentage of HR Including Other Job Titles

Theatre D	25%
Theatre E	70%

It is difficult to explain the reason for this wide variance, but perhaps it is due to the importance placed on the HR function by theatre leadership. This will be discussed in more detail below.

Volunteers and Part-Time Staff

A significant difference between the for-profit and nonprofit sectors is with the use of volunteers. Many theatres supplement their staff with volunteer ushers, interns and other workers. It is common to have an usher database, and ushers are called to the theatre on a regular or periodic schedule to work specific performances. Ushers are an inexpensive way to encourage engagement with a theatre; many ushers are former employees and retired board members. Interns and apprentices are another common addition to the theatre workforce. Many times they are students fresh out of college, and are willing to receive no pay or a small stipend for the chance to work at a theatre.

Part-time staff are also prevalent at nonprofit theatres as they work in the box office, and on the stage. Although there are strict equity rules for how many hours an actor can work and what their working conditions are, they are not managed by the full-time staff in the theatre. Most of the time they are looked after by a Company Manager who also arranges their housing and travel (if they are from out of town) and their payroll. The Company Manager is often aligned with the artistic side of the theatre, and is not technically an HR Manager. If there is ever a grievance with an actor, it would normally be brought up the proper channels to the Artistic Director of the theatre. One of the Audience Services Managers interviewed believes that part-

time box office staff should be treated the same as full-time staff, and included in staff meetings, annual appraisals, and training classes.

Human Resources Responsibilities, Processes and Procedures

Many of the individuals interviewed for this study wear many hats. They are responsible for not only the people operations function at the organization, but most of the time the finance and accounting function as well. Finance is the area where there seems to be the most overlap, and most likely it gets folded in with the HR function because the functions of payroll, benefits, tax forms, and new hire paperwork seem to be related and connected. Other areas many are responsible for include information technology, facilities, unions/contracts, legal, insurance, rentals and events, and general office management. This means that when the printer runs out of toner, many times the same individual ordering the office supplies is also responsible for interviewing candidates for a senior level director position when there is a vacancy. There is a risk to the individual being “spread too thin,” and when emergencies pop up in their day-to-day activities, the longer-term or strategic people responsibilities get pushed to the side. Many interviewees expressed their dissatisfaction with the multi-tasking role they are in, but due to limited resources they have learned to cope with the situation.

Mr. Cynova, a well-known leader in the arts and culture field, thinks that there may actually be a benefit to wearing multiple hats. As the co-CEO of his arts organization (which has a shared leadership model), Mr. Cynova sits in the center of finance, operations and people at his nonprofit. In his role he is able to see what is happening around all pieces of his organization, and he stated that he can “pull more levers than you can if you had just an HR role,” implying that he can make decisions faster and change priorities when necessary. Of course, there are pros and cons to having a variety of roles and responsibilities in one position.

Outside Help

Most of the theatres have outside lawyers and/or board members filling critical functions in the HR arena, such as creating an employee handbook or advice for when the law is updated. A few theatres have a pro-bono relationship with an employment lawyer at a law firm, and these law firms are essential in case of a lawsuit or just to seek general advice. Two of the theatres interviewed rely on board members who are retired employment attorneys to advise the theatres on serious issues. This could be risky due to the fact that a retired lawyer may not be current on their Continuing Legal Education (CLE's) and may not be aware of current legislation if they are retired from their "day job." Some of these board members also create and revise policies and procedures, conduct annual sexual harassment training for staff, and other one-off projects for nonprofit theatres. When one Managing Director was asked what would happen when a relied-upon board member hit his or her term limit, or retired from the board, the response was that they would re-elect this person or recruit another board member with similar skills. Also, theatres that are members of LORT can have access to a labor attorney who assists with union contracts. One expert says it is fine to use board members and employment attorneys for special projects, but the role should be as a sounding board or for a one-off assignment, not as a replacement for regular HR support inside the theatre. The fact that outside law firms assist nonprofit arts organizations for free or that board members provide these services saves the theatres thousands of dollars each year, and with limited funds, it is understandable that the theatres have become reliant on their assistance.

HR Outsourcing

Outsourcing at nonprofit arts organizations can mean different things to different organizations. To one theatre, it could mean having an executive search firm assist with recruiting for a senior leadership position. To another theatre, it could mean bringing in a consultant to deliver important all-staff training. And still, another approach is having a consultant from an outsourcing firm provide supplemental help to the organization in the form of day-to-day HR support. If the organization does not have the expertise in-house, or if they lack the time to administer HR functions on a regular basis, then HR outsourcing is a solution the theatre can consider.

One theatre interviewed is currently embracing HR outsourcing. Since this theatre has both a new Artistic Director and a new Managing Director in the past year, its leadership is showing a renewed approach to people operations. Turnover in leadership is commonly a good reason to revisit current policies and procedures in any industry. This theatre hired an HR Consultant on retainer for approximately 8-10 hours per week, and is rewriting job descriptions, reviewing the performance review process, reviewing pay systems, looking into the philosophy behind hourly wages and promotions, tackling staff-wide supervisory training, and many more areas of focus. Hiring this consultant has both positives and negatives for the theatres. On the positive side, the consultant is able to take an unbiased, holistic approach to reviewing all systems and processes. In addition, by scheduling “one-on-one” meetings with staff, the consultant is able to get a well-rounded picture of the different roles people play in the organization, and gather information on what they accomplish day to day. On the negative side, as a contracted service provider, the consultant is not integrated into the culture of the organization and may not understand the theatre’s history, people and nuances. In addition, when

the project is complete the theatre may lose the insights gained from the consultant's time at the theatre.

HR outsourcing can be a useful tool when an organization does not have the money or the time to work on HR projects on their own. Or, HR outsourcing can be used to supplement a manager who may not have the expertise in a specific area within HR, such as executive recruiting. It is up to the theatres to decide if this is a viable option for them.

Many Don't Know What They Are Missing

A commonly used phrase is: "you don't know what you don't know" and this sometimes is the case with the HR function at nonprofit regional theatres. Unless the leadership has worked for a large organization with an entire HR department, or worked on the for-profit or corporate side, they may not be familiar with the structure of an HR department and the benefits of having a dedicated team in place. Compared to the for-profit world, nonprofit theatres are not well advanced in their strategic HR orientation. For the small or less mature arts organization, they have probably never been exposed to advanced HR theories such as 360-degree reviews, putting a succession plan in place, learning behavioral interviewing techniques, or creating a performance plan for a poor performer. If the individual in the nonprofit theatre is performing HR duties 20-50% of their time, most likely he or she would not have time to accomplish these HR strategies and to put formalized programs and processes into place, as they would be spending most of their time on administrative functions such as processing new hire paperwork, managing the annual benefits enrollment and tracking whether or not annual performance reviews have been completed. They simply don't know what they are missing since they have never been exposed to or participated in these tasks.

Pushing Down to Lower-Level Staff

Many theatre apprentice programs offer full-time immersion in the management of a theatre, and provide recent college graduates with knowledge of working in the theatre after undergraduate studies. One theatre utilizes their apprentice program for assistance in the human resources area. This is a creative use of talent in a nonprofit theatre. If the assistance provided by the apprentice is administrative in nature, then it is actually a good way to push the lower-level tasks down to an entry-level employee, which would then free up the management level for higher level tasks.

Inconsistency from Theatre to Theatre

There is much inconsistency from theatre to theatre. The role of the theatre leadership, including how long they've been in their roles and their leadership style, is the leading factor to determine whether there is an individual filling a human resources role or combining it with another management role. As one may have guessed, budget and financial resources play a huge factor, as does the size of the theatre. A theatre with a budget of \$2,000,000 and a full-time staff of 15 is not going to have the same needs as a theatre with a budget of \$25,000,000 and a full-time staff of 50. Mr. Sweibel clearly stated, "Budget is a statement of values." He believes that if an arts organization does not budget for the HR functionality and invest in that area, how does the staff get serviced properly and effectively? Many theatre executives were raised in theatres without HR when the theatres were in a growth phase. In addition, and regrettably, in the nonprofit theatre world the labor market is easy to exploit, as evidenced by the large number of volunteers assisting in roles that would be paid in the for-profit world. Many staff are "starry-eyed" and staff is more tolerant of things not being done exactly the right way, since they are

very willing to work there. Theatre employees are deeply passionate and connected to their work and will put up with things that employees wouldn't encounter in the for-profit world.

Another reason for inconsistency is that it depends on what the theatre needed at the time the position was created. Some managing directors inherit their reporting structure from a previous director, and some create a new one when they arrive. It depends on the existing talent and whether the leadership wants to train someone, or they are prioritizing the creative side over the administrative side of personnel management.

Opinions of Managing Directors

The managing directors interviewed for this thesis varied greatly on their views on the importance of the human resources function at their theatre. Even without HR being a dedicated role, the leaders all seemed to have a good handle on the people within their organization – they knew which departments were dissatisfied, why people were leaving or why they left, how stressed different departments were about deadlines, and other details about their staff.

One managing director relayed a story about a staff member who had responsibilities that included finance, HR and contracts. This individual expressed interest in spending more time working in the human resources area, and the managing director was able to accommodate this wish. The leader said that if he left the organization, the structure may not stay the same. The willingness of this managing director to be flexible and allow a staff person to work in an area of interest shows the quality of leadership of this director.

Another managing director stated very eloquently: “[HR] needs to be core, properly resourced and it needs to be ‘at the table’.” Being “at the table” implies that the HR position is part of senior leadership of the theatre, and this director stressed its importance as “a discipline that we need and a resource that we need.” This leader also believes that if the HR function is

not centralized in someone's job, that the theatre wouldn't be able to do action items such as quarterly training because the other department heads are just too busy.

The managing director at a mid-sized theatre stated that his general manager handles multiple responsibilities including HR well. He believes that creating a rapport with people, being approachable, and handling the logistics side well is the role of HR. His view is that HR is “not a useless position, but it is not measurable – artistic isn't measurable either, but it is part of the mission; HR is support.” Given the findings of the literature review, this view seems short-sighted, and may be a case of “not knowing what he is missing.”

Opinions of Consultants and Other Experts

The data obtained from experts in the theatre community were consistent with one another. They each concluded that the HR function is just as important as other positions and that to best serve employees, it should be a standalone position and not included with finance and other areas. Sweibel believes that it is to the “detriment of the organization if there is not a confidential, dedicated person to advance the staff and not just protect the organization.” He believes that an organization with a dedicated HR position on staff is more likely to create connectivity between the staff, and someone on site could be responsible for advancing people and career development, which is often overlooked in the informality of theatres. Having a confidential platform for staff to turn to should be part of the culture, and can make the staff more productive and satisfied. Because all theatres have scarcity of resources, the HR function often gets “tossed” to the person who does finance or it gets wrapped up with other administrative areas.

Sweibel also believes that arts organizations put the vast amount of their creative resources into creating the art, and not advancing creatively the people who make it all happen.

He stated that “investing in your people comes back to serve the organization” and that it is better to invest in your people than to “burn through them.”

Cynova believes that “in most arts organizations the HR function lives with the finance person – that colors it in a really unhelpful way.” He goes on to say that “the skills that make a great Controller are not the same skills that make a great HR person” which is true since finance professionals have training in accounting, auditing and taxes and the skills of a terrific HR professional may be more “softer skills” such as empathy, creativity and planning. When the HR person also handles finance, IT, facilities and other important areas, HR sometimes gets pushed to the side when there is another emergency. Cynova believes that there are creative ways to think about the HR function, and that the best thing for an arts organization to do is to figure out what the human beings who work at the organization need and then adjust the structure accordingly.

Cynova also agrees with Sweibel’s position that “creatives” are frequently running the organization but don’t have the training. He stated that arts organizations are filled with former artists and other creative people, but they “check that creativity at the door” when they are looking at the structures that support the organization.

Other Findings

Many theatre leaders and experts in the field have admitted that personalities in nonprofit theatres can be different than in other arts organizations or in the corporate world. Many theatre leaders used to be actors, and therefore have a “dramatic” tendency. Since many regional theatres grew out of community theatre or out of someone’s basement, they tend to be more “informal” than other organizations, including other nonprofits. One General Manager stated that “theatres are not a normal business,” implying that theatres have their own ways of doing business. Many

“leaders look the other way” and know that they are not running things properly. As one general manager admitted, if they get sued it was “just the cost of doing business.”

Conversations with Sweibel and Cynova uncovered the fact that theatres can look to the for-profit world for best practices, and then adopt those best practices for their organization. In addition, Mr. Taylor, a well-known Arts Management professor and consultant stated that even though most processes and procedures in nonprofits are borrowed from for-profits, some don't transfer well. For example, just the exercise of doing annual reviews does not make employees thrive at a nonprofit. On the other hand, staff might be thriving at an organization that does not do annual reviews, which shows that it is hard to evaluate and measure these things.

CHAPTER 5

CONCLUSIONS AND RECOMMENDATIONS

The literature reviewed and interviews conducted both demonstrate how a deeper involvement with employees, volunteers and contractors in a theatre workplace can enhance relationships, increase training opportunities for staff, and prevent legal issues. A renewed focus on the “people operations” side can provide opportunities for staff to achieve promotions, continuing education and a higher level of engagement. Even though most individuals in the HR function at a nonprofit theatre have no HR training, and even though there is a variety of opinions among Managing Directors as to the importance of a dedicated HR role, one can still conclude that staff and volunteers are an integral part of the organization, and the organization cannot thrive unless the people who work there are happy.

There are multiple factors that contribute to the decision of whether a theatre has a dedicated HR manager/director. The research has shown that in addition to budget being a primary factor, there are also other factors that are important. Mr. Sweibel discussed a “leadership mindset” of the theatre – the beliefs of the leader determine the structure of the organization. In addition, the size of the theatre and the longevity of the theatre play a role in determining the reporting structure and the types of positions the theatre has in its organizational chart. Other factors include whether the incumbent is truly interested in learning about HR practices, procedures and HR as a field of knowledge, and whether the managing director inherited the reporting structure from their predecessor.

For those theatres who either do not have a dedicated HR Director role, or who have an individual in a leadership role that also handles HR, there are specific recommendations offered to assist the incumbent in his or her role to support the organization.

Periodic Training and Seminars

The company Nonprofit HR could be a useful resource for any type of nonprofit organization with an HR question (Nonprofit HR 2020). The organization is based in Washington, DC, and serves two groups of clients: nonprofit organizations with a dedicated HR staff person, and nonprofit organizations without a dedicated HR staff person. They provide consulting services, outsourcing and executive search. A benefit to this type of resource is that it is a specialty consulting company focusing on HR for nonprofits. A drawback is that the organization does not specialize in nonprofit arts and culture – they service many other types of industries including education, associations, human rights, poverty and more, which means that they may not be able to understand the nuances that come along with managing people in a theatre.

As an example, one recent free training offered by Nonprofit HR was entitled: “Realities: Employee Engagement and Belonging Practices in Nonprofits.” The class description reads:

How high on the scale would your employees rank their sense of belonging in your organization? It is not enough to assume that your employees feel connected and like they belong at work. The third-highest driver for voluntary turnover in organizations, 26.2%, was dissatisfaction and disengagement with current organizational culture according to Nonprofit HR’s 2019 Retention Practices Survey. Belonging is linked to increased job performance and can strengthen employee engagement. Understanding the extent to which your diverse staff feels a part of the culture is critical to your DEI efforts.

- How to identify and address employee engagement differences based on employee demographic makeup
- New ways that employees may expect to influence, engage and be heard in the workplace

- How to create meaningful employee engagement practices aimed at fostering belonging

Regardless of the type of nonprofit organization, all can benefit from these types of classes, especially with Nonprofit HR offering the class at no cost.

Nonprofit HR also publishes periodic blogs and articles on their website and distributes them via email. One example of a recent blog was a review of “Diversity, Equity and Inclusion in Performance Management” which could provide useful to anyone in a nonprofit theatre in a leadership position: <https://www.nonprofithr.com/diversity-equity-and-inclusion-in-performance-management/>.

If the General Managers and Directors of Finance and Administration, in addition to the HR Directors, had the time to read these blogs and take these training classes, they would be more knowledgeable about the latest issues and be able to serve their staff better.

Law firms also offer classes, meetings and workshops for clients and non-clients alike. Many reputable law firms have an employment law division, and these experts conduct seminars and training for individuals on timely rulings and new laws. Most of the theatres interviewed for this research have an ongoing relationship with a lawyer, either pro-bono or paid, at a well-respected law firm. In addition, many of these lawyers also conduct training for the staff at the theatres, such as annual sexual harassment training. And, as discussed in the previous section, an employment lawyer who works at a law firm but provides services pro-bono to nonprofit organizations, or who sits on the Board of Directors of the organization, can be helpful.

Association Memberships

Annual membership in an association can assist theatres with their people operations and human resources management. SHRM (Society for Human Resource Management) is the leading association for professional HR certification in the world, and the organization administers two certification exams for anyone involved in the HR profession: the SHRM Certified Professional (SHRM-CP®) exam for early-career and mid-level practitioners, and the SHRM Senior Certified Professional (SHRM-SCP®) exam for senior-level and executive practitioners. SHRM publishes the *SHRM Body of Competency and Knowledge* as a handbook for any practitioner thinking about HR certification, or who would like to increase their knowledge in any number of HR areas. The manual breaks down the skills and competencies into 15 functional areas within three broader categories: People Knowledge, Organizational Knowledge, and Workplace Knowledge. All of these skills are essential for the modern HR professional. The material outlines the skills and competencies that all HR professionals should have, regardless of whether you work at a for-profit company or a nonprofit organization.

In addition to SHRM, multiple organizations exist that HR Directors and those responsible for people in a theatre can use if they do not have a dedicated HR person on staff. One such example is the National Council of Nonprofits, a national organization and a resource for nonprofit organizations to turn to when they need advice or assistance with advocacy work, or want to network with other nonprofits. It is a membership organization which also has state councils that connect nonprofits with each other, and their website contains links to other websites providing similar information. A strong component of their website is a section entitled, “Employment and HR” which may be useful to a nonprofit organization that does not have a dedicated HR staff person. The articles and resources are on topics such as telecommuting,

workers compensation, benefits and sexual harassment. Even though they are helpful, theatre leaders need to be careful not to only rely on this information because the topics seem to be “hit or miss” and do not constitute a complete guidebook or reference manual.

In Maryland, a membership organization called Maryland Nonprofits serves as a resource for nonprofit organizations when they need assistance forming a new nonprofit organization, or when they need assistance running their organization. According to the organization’s website, the services provided include consulting, networking with other nonprofits, documents and resources, training and development, research and advocacy. There is also a membership directory for nonprofits to connect and learn from one another. Any nonprofit, including arts and non-arts organizations, can turn to this resource for advice or assistance. The information is not broken down by industry, which would be nice to see.

Other organizations who offer memberships, training and certifications that could be beneficial to theatre management are Theatre Communications Group (TCG), League of Resident Theatres (LORT) and American Theatre Wing.

Get Help/Spread the Joy

Another topic discussed with one HR Director is to try and get administrative support for those in HR roles so higher-level managers can focus more on planning and strategic HR functions. The administrative or junior-level staff support can perform tasks such as tracking annual reviews in a spreadsheet, answering basic benefits questions from employees, conducting new employee orientation and onboarding, and other tasks which would free up the senior staff for tasks such as complex employee relations issues, law suits, research into benefits vendors,

and longer term projects. Even with scarce resources, theatres can move staff around and utilize volunteers, interns, apprentices and others for support in non-confidential areas.

When a theatre professional has multiple responsibilities, there are pros and cons to having a variety of duties in one position. On the positive side, the person handling the budget can allocate dollars to different departments, including HR, if he or she is also responsible for finance. Or, if the HR manager is also responsible for facilities then he or she can move people around to different spaces after a promotion or to allow a team to collaborate. An obvious drawback to wearing multiple hats is that the individual does many things but it is hard to do them all well. They would be considered a generalist, not a specialist, and would not be able to gain a deep understanding of the HR field.

Apprentice programs can be a wonderful learning experience for less skilled staff, but using an apprentice for sensitive employee relations issues, or to file confidential paperwork, is not a wise idea. Giving temporary staff access to compensation and payroll information, personnel files and past grievance information is risky, as that apprentice is not a full-time employee and is not held to the same standards and code of conduct as a full-time employee. However, if there is an entry-level employee who has an interest in learning more about the HR area this person can still be invaluable to a General Manager or Director which would then free him or her up to tackle the higher level, strategic responsibilities. Updating budgets and forecasts with actual numbers, filling out Department of Labor reports, sending out health insurance surveys, filing new hire paperwork, and organizing all-staff training days are all tasks that can be given to an assistant.

HR Outsourcing or Consultancies

As discussed in the previous section, theatres can always consider HR outsourcing and/or bringing in an HR consultant for project work. Some examples of the type of projects that can be worked on include creating basic policies and procedures in areas such as recruiting and performance management, a compensation review/study at competing theatres, drafting job descriptions, and creating standard interview screening questions. These hours can be on retainer for a certain number of hours per week (usually 10-20) or the consultant can be paid by the project. A small piece of a larger HR function can be outsourced as well. One theatre spoken to is using an outsourced anonymous hotline for employee grievances to supplement the in-house employee relations function. If employees don't feel comfortable going to theatre leadership regarding an issue, this hotline is a good alternative to having someone to talk to at the theatre.

Training of Current Managers and Leadership

It is imperative for theatre management to provide periodic training to General Managers and others performing the HR function on how to give performance reviews impartially, recruiting training and rules for hiring/interviewing, general legal compliance and more. Theatre Communications Group's article by Woods (2002) agrees in their statement about "the need to conduct interview training for department heads" in theatres.

Support from Counterparts Across the Region/Country

One HR Director at a large theatre mentioned a "Google Group" for members of LORT. This group has proven to be very helpful, especially during the pandemic, since theatre is so specialized. In this group members can ask questions of each other and provide a support

network to each other, connecting with counterparts across the country in a similar role. This Director also mentioned feeling comfortable reaching out to anyone in the theatre community as it is a tight-knit group. As the research from NetGain partners so eloquently said: “In the absence of a dedicated HR professional in the organization to lead the way, they know it is their responsibility to learn how to manage people effectively and put best practices into action.” (NetGain Partners Inc. n.d.) Therefore, getting support and guidance from others outside your organization is a viable option for those theatres who do not have a dedicated person in an HR role.

Other Recommendations

Taking inspiration from major corporations such as Google is a good place to start if a theatre will be looking to the for-profit side for inspiration. This may sound unrealistic for an organization with a \$5 million budget, but if a leader looks at the interesting ways the corporate side is approaching their people function, they may be able to select a piece of it and retrofit it back into their organization.

Suggestions for Further Research

Additional research would be beneficial surrounding this topic. Addressing questions such as whether nonprofits should adopt HR practices from the for-profit sector, and a study looking into the dollars spent on lawsuits compared to the salary of a dedicated HR Director would be interesting to see. In addition, studies into the rate of employee turnover, engagement, retention and employee satisfaction would assist in guiding researchers in the future. And finally,

looking at the differences in culture from theatre to theatre would paint a picture of how a focus on human resources can benefit theatres of all sizes.

APPENDIX A

LIST OF THEATRES AND EXPERTS

A total of 13 professionals at 9 local theatres participated in interviews for this paper, in addition to 3 outside experts in the field. I would like to thank all of these individuals for their time and assistance with my research. The following is a list of participating professionals:

American University

Taylor, Andrew - Professor of Arts Management

Arena Stage

Dobie, Edgar - Executive Producer

Ford's Theatre

Wilson, Douglas - Director of Finance and Administration

Fractured Atlas

Cynova, Tim - Co-CEO

Imagination Stage

Former Director of Human Resources

Robert Sweibel Arts and Culture Consulting

Sweibel, Robert - Founder and President

Olney Theatre Center

Paul, Fred - General Manager

Round House Theatre

Catharini, Mason - Audience Development Manager

Conley, Tim - General Manager

Leaverton, Emmy - Associate General Manager

Zakreski, Ed - Managing Director

Shakespeare Theatre

Morris, Lindsey - Director of Human Resources

Signature Theatre

Boland, Maggie - Managing Director

Colton, Eric Mathew - Associate Director of Human Resources & Management

Studio Theatre

Huey, Kathryn - General Manager

Woolly Mammoth

Brown, Shelby - Associate General Manager

APPENDIX B

SAMPLE JOB DESCRIPTION

DIRECTOR OF HUMAN RESOURCES AT A REGIONAL THEATRE

JOB DESCRIPTION

The Director of Human Resources will oversee all strategic and functional Human Resources operations. As a member of the senior staff and reporting to the Executive Director, the Director of Human Resources will develop and implement strategic human resource initiatives related to recruiting, hiring, and retaining staff, including diversity, equity and inclusion concentration. The Director will be instrumental in creating and fostering a work culture that reflects and borrows from the culture of the rehearsal hall which values experimentation and collaboration.

REQUIREMENTS

- Bachelor's degree.
- 8-10 years of human resource generalist experience.
- Passion for theater and arts administration.

SKILLS/COMPETENCIES

- In-depth knowledge and understanding of HR compliance, benefits administration, records retention, HR policies and procedures and personnel management.
- General understanding of employment law.
- Excellent organizational skills and the ability to multi-task and time manage effectively.
- Strong interpersonal skills and a professional work manner.
- Ability to act with discretion.
- Must be a strong self-starter and project manager with the ability to see projects to their conclusion.

MAJOR FUNCTIONS AND RESPONSIBILITIES

STRATEGIC INITIATIVES

- In coordination with the Executive Director and Senior Staff, develop and implement strategic human resource initiatives related to recruiting and hiring, including concentration of diversity and inclusion.
- In coordination with the Executive Director and Senior Staff and working with the staff, create and implement a code of conduct.
- Conduct periodic audit of salary and titles to ensure consistency within the organization.
- Manage an external job and compensation analysis to review market-value of positions.
- Propose human resources initiatives to the Executive Director and Senior Staff that will move the HR department and organization forward.

RECRUITMENT

- Oversee the recruiting and hiring process for all regular and seasonal positions (full and part-time), including managing the applicant database.
- Post all regular and seasonal positions internally and externally.
- Initial review of all candidates, including screening candidates for experience and salary requirements.
- Work with hiring managers to ensure a consistent recruiting process, including a focus on diversity and inclusion.

HIRING AND ORIENTATIONS

- Communicate initial job offers to prospective employees.
- Compose and send offer letters and benefits information, set start date.

- Communicate on-boarding information to appropriate departments (i.e., Operations, IT, etc.)
- Conduct New Employee Orientations, as necessary.
- Maintain and expand new employee orientation materials.
- Ensure all new hire paperwork is up to date and forwarded to the Payroll Manager in a timely manner.
- Draft and send new hire announcements to all staff.

BENEFITS ADMINISTRATION

- In coordination with the Chief Development Officer, work with the benefits administrators on the annual insurance renewals and open enrollment process.
- Ensure compliance with FMLA, ADA and all benefit-related regulations.
- Answer employee's benefits questions.
- Enroll employees, process change requests, terminate coverage.
- Administer COBRA Benefits and manage current participation in COBRA.
- Coordinate periodic 403(b) representative visits.
- Act as a point of contact between employees and 403(b) representative.

WORKER'S COMPENSATION

- Administer all worker's compensation benefits.
- Track all active claims.
- Submit claims for processing and communicate necessary information to worker's compensation insurer.

RECORD KEEPING AND REPORTING

- Audit and maintain regular and seasonal employees, former employee personnel and medical files.
- Complete EE01 reports, and fulfill other Government reporting requirements.
- Respond to employment verification requests.

POLICY DEVELOPMENT/HANDBOOK

- Review, update and create organizational policies to ensure compliance.
- Communicate all policies clearly and effectively to staff.

PERSONNEL/PERFORMANCE MANAGEMENT

- Counsel staff on personnel matters, including coaching and development opportunities.
- Counsel managers on procedures relating to performance review and development, including performance improvement plans, as necessary.
- Communicate with Executive Director and Senior Staff regarding personnel issues, as necessary.
- Review and update performance evaluation process, work with managers on the evaluation timeline, ensuring evaluations are completed and documented annually.

INTERNAL COMMUNICATIONS AND EVENTS

- Attend weekly Internal Communication meetings.
- Solicit agenda items for All-Staff meetings and schedule accordingly.
- Lead the Events Committee to plan the holiday party, summer picnic, chili cook-off and other events as needed.
- Set up and execute Employee Recognition event annually, including review of recognition dates and gifts.
- When appropriate, organize retirement recognition events.

ADDITIONAL INFORMATION:

Our theatre values diversity, equity and inclusion in the workplace and is an equal opportunity employer. Salary is competitive commensurate with experience. Benefits include vacation, medical and dental insurance, and 403(b) plan and life insurance/long term disability coverage upon eligibility.

APPENDIX C

PERSONAL REFLECTION

2020 was not a great year for theatre, perhaps the worst in US history. Arts organizations have been turned upside down and operations in the performing arts industry have been deeply disrupted due to the COVID-19 global pandemic. Many theatres have had to dismiss and furlough staff, and morale is low due to racial tensions, a difficult election year, and the economy. According to Americans for the Arts, 63% of artists and creatives have become fully unemployed as of September 2020. In addition, 96% of arts organizations have had to cancel events due to government regulations or safety procedures, and the resulting economic impact is tremendous. Most arts and cultural organizations have seen a significant decrease in earned income and donations, and grant money for programming expected to come in in 2020 has been shifted to 2021.

Therefore, starting on a capstone project in the middle of a global pandemic, and at a time when theatres are essentially shut down was challenging to say the least. Many theatres have turned to virtual performances to bring in revenue this year, but the audience experience is not the same. Employees are worried about their job stability, and leadership is worried about the longevity of their organization. Approaching theatres and asking them about their organizational structure and people operations was risky, but due to relationships I've developed through my apprenticeship at a regional, nonprofit theatre, through a mentor program with theatre Washington, and through students, professors and alumni from my academic program, I started with a good target group of individuals I wanted to speak to about my project.

Most of the interviews conducted for this research study were done approximately six months into the shutdown, and it was fortunate that many theatre workers had the time to speak

to a graduate student writing her thesis. While researching the operations of nine local theatres over the past eight months, I witnessed layoffs, furloughs, resignations, open positions not being filled immediately, theatre staff moving away to be closer to family, most working remotely, and many unsure of what the future brings. Many roles and positions that were in existence pre-Covid will most likely be shifted around in the future based on changing needs. The new reality of the world will probably bring an increased focus (and possible newly created positions) in the Equity/Diversity/Inclusion/Accessibility (EDIA) area.

Throughout my interviews with arts leaders in the community, I asked them to try and answer my questions as if we were suspended in time before the pandemic. I asked them to recall a year in which the season was not canceled, when donations were still coming in, annual galas were taking place, and thousands of patrons were coming through their doors. Some were not thrilled to suspend reality, as we must admit we are living in this unprecedented time and all theatre operations have been impacted. Others were happy to play along. Although it was challenging to pretend that we were in a pre-2020 era, when theatres would normally be hiring talent and not letting talent go, for the purposes of this research the staffing numbers in this study reflect pre-covid staffing levels.

The reason I chose this topic for my capstone was because it was an opportunity for me to marry my two interests – people operations and theatre operations. Even though the reason I went back to school was to change careers, I cannot separate myself from my old career in HR. I spent fifteen+ years learning about how to hire and manage people in different types and sizes of organizations, and it is a huge part of who I am.

Throughout my childhood, into my teenage years and in college, I enjoyed all of the performing arts as a hobby. However, when it came time to pick a major in college, I was pushed

towards something safe, resulting in accounting. I was good with numbers and interested in business, and I was told I would always be able to get a job. After college I worked for three years as an auditor in a “Big 4” accounting firm. It was like being a mouse on a wheel that never stopped spinning – working seventy hours a week, traveling all of the time, and studying for my CPA license. I had an interest in joining a choir or a community theatre, but there simply wasn’t time. I unknowingly abandoned my interest in performing arts to focus on my career and to start a family.

When I discovered human resources and recruiting, I consciously pivoted to a new job at the accounting firm, and all of a sudden I knew that I had found a new path. Working with people, coaching them, guiding them, and mentoring them came naturally to me. I wish my university had human resources as a major, as I probably would have chosen it to focus on. But realizing that I enjoyed HR more than accounting, and that I was good at it, was enough to keep me motivated for a while.

The next decade was spent learning all I could about this new profession, and I enjoyed the challenges and the professional development. Working in a large human resources department at multiple for-profit companies was an amazing learning experience. I was able to be mentored by thought leaders and perform cutting edge work, fully supported by my team and department. As time went on, I went through a merger, multiple employers, restructuring, and choosing a specialty over the years.

When I moved into part time jobs to spend more time with my family, I then realized that I was just working for the paycheck, and not to fulfill my dreams. I had a hard time putting my finger on exactly what I wanted to do for the rest of my working years, and that is when I decided to start the program at American University to fill in the skills and knowledge that I had

not yet learned. Changing careers and going back to school at a “certain age” is intimidating; trying to blend in and relate to younger generations after being out of the full-time workforce for many years was difficult, but I rose to the challenge.

I was lucky enough to obtain an internship, and then an apprenticeship, at a local nonprofit theatre to put into practice the theory I was learning in school. My two years of nonprofit arts experience solidified my interest in specializing in marketing or program management at a regional theatre and gave me an insider look as to how a theatre is run. What I observed during my internship and apprenticeship started my wheels spinning – I began to wonder, are all theatres structured this way? Do they all have the same departments? What if the theatres have a different sized budget – do they have the same makeup of staff? How are the people managed in a nonprofit compared to a for-profit? How are they rewarded and compensated?

As I worked through my research and my interviews, I found it hard to take my for-profit organizational bias out of the process. I wound up re-wording my questions and modifying the types of questions I asked people in different roles, trying not to ask leading questions. I became better at this task as time went on, kept an open mind throughout the process and it turned out to be a true learning experience for me.

When I began my research, my hypothesis was that all theatres should have a dedicated HR manager or staff person. However, what I uncovered in my literature review and throughout my interviews is that there are other options that are good alternatives to having a single, HR representative at a theatre. This thesis reminded me that training is of paramount importance, and that theatres can be creative with limited resources.

My professional goal is to someday be a managing director of a theatre, and it is imperative for any arts manager or director to understand how the HR function works and how HR resources can benefit any size of nonprofit organization. The hope is that this thesis can be a resource for theatre leaders for years to come.

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