

Rethinking the Use of the Case Study in the Arts Management Classroom

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The performing and visual arts, and the humanities, have long been supported by the public and private sectors in the United States. Today's public and political climate, however, challenges the survival of the arts and the production of culture. With government and private sector threats to funding, privatization, corporate downsizing, and fewer philanthropic dollars, the survival of artists and cultural organizations that have historically been well-served by these resources is at risk. Encouraged at times by the vision of arts managers, but more so by the dictates of the funding environment, many cultural institutions have used ideas and models from other nonprofit and for-profit sectors to offset these threats and to manage their resources. The increased reliance on quid pro quo business and marketing-for-a-price strategies against a conventional patronage and altruistic environment is a daily challenge for the arts manager.

Today's arts managers need multifaceted skills to understand issues in-depth, to think critically, and to function effectively in both the nonprofit and commercial environments. In this article I will discuss new possibilities for the use of the case study in the arts management classroom—one that is pedagogically focused rather than curricular-driven. I will also examine the implications of POMSA's case-study paradigm used during 1996–98 for four theatres based in Washington, D.C., with particular attention to Round House Theatre, located in Montgomery County, Maryland.

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The Project on Management Studies in the Arts (POMSA) was funded as an Institutional Excellence Center—a three-year initiative in 1995 at American University in Washington, D.C. In Fall 1999, POMSA became associated with the Arts Management Program at the College of Charleston in Charleston, South Carolina. With a student research team, the project conducts and disseminates case-study research on current and innovative management strategies in nonprofit and for-profit cultural institutions. POMSA studies the processes by which arts organizations adapt to changing funding and political environments. The implementation of organizational strategies such as new funding and support structures, nonconventional marketing strategies to obtain younger and more ethnically diverse audiences while still sustaining current audiences, and organizational restructuring are issues on which POMSA focuses its case-study work in partnership with arts organizations.

**How We Teach—How Students Learn:
Possibilities for the Case Study Approach**

It's uh known fact, . . .
you got tuh go there
tuh know there.

Their Eyes Were Watching God,
by Zora Neale Hurston

POMSA's case study design was inspired by the work of novelist, folklorist, traveler, and anthropologist Zora Neale Hurston. The early anthropological studies of Hurston and Margaret Mead serve as a context for POMSA's qualitative and ethnographic methodology. This design, as described by one of POMSA's visiting fellows, John McLaughlin, involves "walking within the culture" of arts organizations. In other words, POMSA's goal is to facilitate students' learning about the organization, first-hand, from the organization's managers—studying its issues, tasks, and initiatives and then dissecting them through an intense analytical process, as opposed to (and perhaps complementary to) working in the organization through an internship-like experience.

POMSA's case studies are not intended to be final products—the end result of a phenomenon of change—nor are they envisioned as snapshots of where an organization is during several months of research. But, over time, they document the process by which organizations adapt to change. This case-study approach—or how and why change happens—characterizes its design.

POMSA's research paradigm is, therefore, an assessment tool, and not an evaluative one, for examining arts organizational functioning and change. Although an evaluation is useful, it should represent the final phase of organizational study. The process by which organizations function must encompass the initial phase of study. It is this stage, however, that is less document-

ed in an evaluative design and that is the focus of POMSA's work. In other words, this process and assessment design provides the rich and varied data by which an evaluation can be undertaken.

The arts management curriculum, in its most conventional form, is typically a listing, tracking, or otherwise ordering of specific courses. As these course offerings tend to be linear, it is often left up to the instructor to use his or her experiences to make connections between the wide array of issues in the field. This linear approach in traditional arts management pedagogy can be linked to the conventional hierarchical structures common to many American cultural organizations and businesses. Ambush (1994) explains further this "World of View" against a "World of Event" style of leadership in arts and cultural institutions. "World of View thought . . . is static, refractory, individualized, analytical, linear, and manipulative" (82-83).

World of Event thought . . . embraces symphonic relationships. Its work culture is horizontal or spherical in nature rather than hierarchical, more reliant on oral transmission than the written word. . . . Knowledge is respected regardless of its source, and is more likely to come from those with core direct experience. Openness and tolerance are honored values, and intuitive factors hold sway along with empirical data. We is a more prevailing notion than me. (Ambush 84-85)

The oral transmission of "World of Event" thought to which Ambush refers is a cornerstone of ethnographic research. POMSA's qualitative and ethnographic design employs a more inductive, Socratic-like form of thinking. This process actively engages students in discovering, through informal discussions, more questions as opposed to answers. Charles Ogletree, a Harvard Law School professor who led Socratic dialogues at the 1998 Association of Performing Arts Presenters (APAP) conference, expands the nature of this thought: "The Socratic Dialogue method lives and breathes in the context of the question" (Ogletree 1997, 38). "World of Event" is the philosophy that also underscores the ways in which POMSA involves arts managers as research partners.

Few studies exist that examine how we teach intersecting topics of art production and their management in the nonprofit and commercial worlds. Dorothea's study (1997) of human resource training programs in arts administration and business management suggests that programs not provide instruction that addresses the multifaceted issues students will confront, but rather that they provide pedagogical approaches that help students "understand situations, problems, interpersonal relations and organization tasks" (674). Jeffri and Radbourne (1997) agree that academic experiences focused within a thinking-and-learning context have the potential to respond to sector changes as well as to "embrace research, intellectual discourse and the maintenance of the soul" (10). In other words, the arts management curricula might embrace not just what should be taught, but how it should be taught.

How students are taught is a challenge in a fast-paced and complex environment where students often want didactic and “the-top-ten-ways-that-give-me-the-answer” instruction. A risk of the case approach is losing students whose attention spans and interests are not complementary with this method of inductive thinking and doing, and whose learning orientation is focused on results as opposed to the persistent questions that case studies yield. Do-Roth’s research corroborates this point. The study found that “the younger cohort tended to seek specific answers and focus on specific topic areas (e.g., marketing, finances) and was less interested in the general picture of the arts than the older cohort” (1997, 676).

POMSA’s pedagogical design, however, expects an acceptance of critical and intellectual dialogue over time, a search for more questions and not always the answers (assessment not evaluation). In addition, this design demands thinking and responding inductively; reconciling, negotiating, and prioritizing issues in problem solving; repeating this process within one case study; examining how similarly and differently the same issues unfold in other cases (connecting themes); and action planning that includes considering consequences/responsibilities of decisions.

The case-study design inherently embodies the convergence of theoretical and practical thought and the simultaneous exploration of the work (process) of people involved in change; it also offers a pedagogical approach for the arts management educator. Thomas West, Assistant Director of Grants and Sponsorships at the Kennedy Center and former POMSA student researcher, explained this intersection of issues and topical areas in his arts management training: “Early on in our training, POMSA pulled all the pieces from different [arts management] classes together to provide us a perspective of the theatre.”

Likewise, the case study is useful for teaching students to understand what Sirotnik (1988) states is the complex “situational context, the events, behaviors and activities, and the perceptions of people” (172) in social settings such as cultural institutions. In a case design, intensive interviewing, field observations, document analysis, survey, and focus group research, when employed selectively and simultaneously, and over time, affords the student and arts professional an opportunity to understand an issue deeply and from a variety of perspectives (Williams, Rice, and Rogers 1988; Yin 1990). The use of a variety of these techniques—an inherent characteristic of the case-study design—permits a more accurate portrayal of a case under study than the use of any single methodological approach.

The traditional case method is a valuable teaching tool to familiarize students with management issues and the tools to make informed decisions. It involves students in the examination of a case description or summary for determining problems, analyzing situations, offering options to resolving problems, making choices, and carrying out decisions. Although there are

excellent examples of case summaries such as the National Education Association's (NEA) *Lessons Learned: Case Studies*, the kind of in-depth and longitudinal case-study research that guides POMSA's work is virtually nonexistent in our field. In 1997, the final report of the ninety-second American Assembly—a gathering of 78 representatives from the nonprofit and commercial arts, funding, academic, policy, media, and business communities—states just this fact:

There is a need for research to understand better the scope, scale, and interactions of the commercial, not-for-profit, and unincorporated parts of the arts sector, the sector's supporting infrastructures, strengths and weaknesses within the sector, and the degree to which parts of the sector meet or do not meet public purposes . . . serious and rigorous analysis . . . of artistic enterprises are in many cases lacking. Information is needed on how artistic enterprises operate, how they impact communities, and how they cooperate among themselves, particularly as between the commercial and non-for-profit worlds. . . . case studies should be prepared (i) of efforts of artists and arts institutions to meet public purposes, and (ii) of collaborations between the commercial and non-for-profit worlds . . . universities and others should develop . . . study institutes to foster the expansion of such research. (1997, 30–32)

More often than not, the traditional case study is a short narrative offering highlights of a case situation as opposed to a detailed examination of a question under study. This detached rendering of a case question or problem often begs for "what-if" questions. To include, in a case study, its past history, varying impressions from those directly and indirectly connected to the issue under study as well as how a case question might affect other areas of organizational functioning can be rigorous and quite lengthy, but it is possible in more longitudinal studies. "What-if" questions and case summaries often exclude or can limit the following: (a) comprehensive analyses; (b) qualitative research techniques; (c) integration of topical areas and issues common in the arts management core; (d) opportunities to question organizational managers for a fuller understanding of the topic under study; (e) observation of social and individual dynamics; (f) triangulating data from several methodological techniques and extracting their meaning; (g) experiencing firsthand the case; and (h) studying the organization over time. POMSA's method is inclusive of these pedagogical possibilities.

What is suggested here is that many case descriptions or summaries are often referred to as studies. A detailed examination, rigorous analysis, or careful investigation, as is the nature of a study, is usually not what a case summary is. Moreover, traditional case narratives often involve a detached process of collecting information and are authored by a voice unknown to students, as opposed to a carefully guided research process involving students as is employed in case studies. A benefit of POMSA's case approach is its comprehensive and longitudinal nature; another is the opportunity for students to

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develop and author case studies and then use them in a variety of ways in the classroom.

POMSA in Action

Makin' It On Our Own: An Approach to Privatizing Round House Theatre

POMSA is an example of a responsive research partnership. The involvement of arts managers in POMSA's work, however, is not collaborative research. As applied or action research, being responsive, for POMSA, involves moving the arts organization closer to the research design as a participant instead of as a subject. To this end, the arts professionals of organizations under study are in close communication with POMSA directors and research team members. Although this kind of partnering can be challenging and, in some instances, may prove to be a nightmare for the researcher in terms of maintaining distance between the research process and the organization, it has offered POMSA rich studies.

This type of research partnering has actively involved arts managers in assisting with formulating the initial research question under study; contributing suggestions for interview questions; identifying potential interviewees and observation events/activities; and suggesting documents for analysis. In addition, arts managers learn to be semiactive participants in analysis; to check for factual information; and to provide insights about how emerging issues in the field may affect their organization. A caution here: Although contributions by organizational partners to the research design can be helpful, reliance on such contributions can render a study untrustworthy or less than credible. Control and balance are necessary in partnering.

Based on the goal of implementing longitudinal studies, POMSA conducted two-year case studies between 1996–98 with four Washington, D.C., area theatres. We are currently completing a two-year case history (1998–2000) with the Friends of the Kennedy Center. POMSA's focus on examining the innovation of arts organizations was individually based; we sought to determine what such innovation meant for each theatre. Why and how do they define what they do as successful? We did not choose a scientific approach to determine this or defining a set of criteria that describes innovation and then determining if each theatre matched these criteria. POMSA is based on the premise that innovation among arts organizations, and most nonprofits for that matter, is not a fixed condition or one that can be tested. Innovation, then, is evolving. Thus, POMSA's focus was to understand the interesting and new ways through which theatres adapt to the ever-changing infrastructure of which they are a part. POMSA's study was constructed by examining the innovation in each individual theatre, separate and apart from, and without

regard to, other theatres. In this way, we intentionally disallowed comparison so as to understand deeply the richness of each theatre—a solidly ethnographic approach. We sought innovative descriptions of each theatre by talking with theatre managers themselves, as well as having discussions with a wide range of arts professionals in all disciplines who manage arts organizations in the Washington, D.C., region. We also examined other objective information to guide our definitions of innovation for each site—publicity and the national visibility each has attained—through reading production reviews in *The Washington Post*, *The New York Times*, and *American Theater*.

One of the four professional theatres was Round House Theatre. Located in Montgomery County, Maryland, Round House has had a unique funding history of previous county subsidy and has recently implemented a private funding structure. POMSA examined this process by privatization as the theatre made its separation from public support by the Montgomery County Recreation Department. This process involved but was not limited to the theatre's restructuring itself into a more circular organizational model complemented by management teams.

Round House Theatre, a winner of nine Helen Hayes Awards and countless nominations, including four for actor and producing artistic director, Jerry Whiddon, is committed to providing community audiences with provocative theatre experiences. The theatre fulfills this vision not only through its mainstage season but most notably through education and outreach programs, around which mainstage offerings are based. Both are exemplified in their mission found in the theatre's promotional documents:

The mission of the Round House Theatre is to engage and involve our community by exploring, investigating, and celebrating contemporary life and the human spirit through the widest possible range of provocative and entertaining theatre experiences on the highest artistic level. Our historical foundation is outreach, upon which we build each of our mainstage and education programs.

James C. Nicola, artistic director of the New York Theatre Workshop, and the original, off-Broadway producer of *Rent*, described, in *The Washington Post*, Whiddon's and Round House's commitment to their artistic work. In addition, the dual role Whiddon maintains as both a seasoned actor in the theatre's productions and as a charismatic theatre manager was mentioned:

His [Whiddon's] taste in plays is always very interesting and unexpected. Not predictable. Most people who run theaters are directors, but Jerry comes to the job from an acting background. And instinct, intuition and feeling are the main artistic ingredients of acting. (Rose 1998, G8)

In June 1970, Round House was founded by June Allen as Street 70. Established as an artist-as-educator company, Street 70 performed mime and original works in parks, malls, streets, and schools. As such, it was a com-

munity theatre with very strong outreach efforts. Original members of Street 70 included current Round House producing artistic director Jerry Whiddon and current board member Eliot Pfanstiehl, executive director of Strathmore Hall Arts Center, located in North Bethesda in Montgomery County, Maryland.

In 1971, the company was fully subsidized by the City of Rockville in Montgomery County. And in 1973, it became entirely subsidized by the Montgomery County Recreation Department. In an interview, Pfanstiehl spoke of the origins of county support for what was then Street 70.

Round House Theatre was the only theatre company I know of in the country during my tenure, that was completely on a government payroll. [The] recreation department put in X dollars a year to operate it. X dollars a year were generated in revenue, which never went back to the theatre but just went back to the general fund. . . . It allowed us to do productions which didn't have to become commercially successful. It allowed us to not have to do musicals all the time, although they were actually part of our roots when we were called Street 70.

In 1977, the company moved into the Montgomery County Recreation Center, its current location, and formally became Round House Theatre in 1978. In 1982, the Friends of the Round House Theatre Everywhere (FORTE) was created as a 501(c)3. Their purpose was to raise funds and to provide support for Round House.

In 1988, Round House entered into its first agreement with Actors Equity. Prior to this, the theatre operated without an equity contract. The Small Professional Theatre (SPT) contract helped to professionalize the theatre by providing support for guest artists. During the same year, and as a result of the equity contract, Round House produced its first mainstage season.

FORTE was prominent during this time because it funded the artists that the county could not due to restrictions on nonunion contracting. In 1991, FORTE assumed payroll responsibility for the theatre's technical staff. It was in 1991 that privatization became an initial consideration as an alternative to county funding. As a result of this impending option, the theatre engaged in a strategic planning process under the direction of the National Executive Service Corporation.

FORTE's importance to Round House was felt not only in its assisting the theatre with equity contracts for technical staff, making up for county shortfalls, but also in its funding productions. As such, FORTE became a producing agent for the theatre. During the 1991-92 season, Round House's production of *Joe Egg* was entirely funded by FORTE because the production was cut from the county's schedule.

In 1992, Round House adopted a five-year plan for privatization. It was in 1993 that Round House implemented solid organizational plans, making privatization a reality. Under the five-year phase-out plan, initiatives included

Round House Theatre, Inc., which was formed to combine the county's programs with FORTE. In 1995–96, the theatre increased its income by 87% and ended 1996 with a balance of \$160,000 in funds—two of the first successful benchmarks of privatization.

In 1996, the theatre's managing director left. Peter Jablow, the theatre's board chairman, discussed how Round House staff turned this seeming jolt in its privatization plan into an innovative management structure.

Look at . . . all the major theatres in this city or around the country. You have an artistic director and a managing director. [Round House was] about to go back to that [structure]. . . . The staff came to [Jerry Whiddon] with this idea of having, basically, a team approach to management.

Round House operates several major programs. One, the Round House Theatre School, provides year-round theatre instruction for children, youth, and adults of all ages and skill levels in several convenient locations in the Washington area, including the theatre. In addition, Round House's mainstage, the youngest of the theatre's offerings, currently fluctuates between a four- and five-play season.

Round House's current staff includes Jerry Whiddon as Producing Artistic Director and eleven additional full-time staff, seven artists comprising Round House's company, and 150 free-lance artists, designers, and faculty. During 1997, Round House subscribers totaled 1,534. In this same time, the theatre's subscription rate was 86%. "More than 8 out of 10 [Round House Theatre] season ticket-holders renew their subscriptions each season," says the theatre's 1997–98 season brochure.

In 1996, total assets were \$1 million, an astounding doubling of assets from the preceding year. Earned income alone, at 48% of the theatre's budget, was more than government support (46%) in 1996. Contributed income was 28% of the total budget. The theatre ended the year with a surplus of more than \$200,000. Round House also benefits from an in-kind facility use worth nearly \$50,000.

Privatizing Round House Theatre resulted from an anticipation by theatre leaders during the 1980s that county support would not be sustained indefinitely. Moreover, theatre managers desired more control of their destiny—artistic freedom in their choice of plays, development of educational and outreach programs, and facility issues. Consultant John McCann explained that theatre managers had "been given this mandate from the county that they . . . had to be self-sufficient and independent of the level of county support they receive."

The theatre's process of privatizing, of changing over a five-year period from an entity that was funded 100% by the Montgomery County Recreation Department to an independent professional theatre was, for many interviewed,

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a catalyst for changes within the theatre such as developing the theatre's work and mainstage season, hiring staff, and finding a new approach to the work of the board. Privatizing, however, did not directly lead to such changes. McCann added:

I think only now, can you look back at Round House and get some sense of a comprehensive picture into which privatization is only a part. Their goal may be described as privatization, but their goal has really been creating a very different organization. . . . My view of Round House is not so much of an organization that is privatizing, but moving away from county support. [It] is only one of many things that they are doing.

McCann continued by explaining that the important issue is not necessarily becoming private, but strengthening many facets of the organization as it evolves—a process that the theatre would have been engaged in, despite privatization. In this sense, McCann concluded that privatizing has simply been a part of organizational maturation.

It was in August 1992 that the process of becoming separate from the county was determined and was formally put into place, through a five-year contract with the county government to phase out financial support. At the helm of these negotiations was Round House's Friends group. The successful producing and underwriting of shows by the Friends group as well as the hiring of a development director were some of the first steps in privatizing.

In November 1992, the Friends of Round House recommended that privatization begin on 1 July 1993 if the county provided funding, annually, to be eventually phased out at the five-year point. This was agreed on, and the Friends group achieved total programmatic, artistic, organizational, and budgetary control of the theatre. This decision was critical and timely, particularly in light of severe county budget cuts, reduced federal support, and a debilitating national economy. The decision—a financial one—was viewed as beneficial both to the county and to Round House.

Although the theatre made a good financial decision, in this study we found that the bureaucratic structure of county government inhibited the theatre's artistic growth. Restrictions on the hiring of personnel through the theatre's equity contract, limited advertising and marketing, and the inability to extend shows were challenging beginnings to the theatre's process of gaining autonomy.

In July 1993, and over the next five years, with privatization in full operation, financial and in-kind support would be gradually phased out. This initial phase of the privatization process was a financial burden for the theatre: As a result, it incurred substantial insurance, accounting, legal, employee benefit, and office-related costs. The theatre and county agreed to supplemental appropriation to cover these and other unanticipated costs.

Privatization also eliminated three of the theatre's staff positions. In an effort to maintain costs, the managing director—formerly the development director for the Friends group—provided fund raising, administrative, and general financial oversight of the theatre. As when a theatre is started from the ground up, new job descriptions, a personnel policy manual, employee benefits, new accounting systems, legal and vendor contracts, and the installation of office equipment were added to the already busy programming operation of the theatre.

Adjustments to the operating budget included eliminating some education and outreach programs while putting others on hiatus, reducing the number of plays in the mainstage season, eliminating and merging staff positions while postponing the hiring of a development director, reducing general operating expenses including salaries, and cutting production costs. Despite organizational and financial challenges, the first season under privatization, in FY 1993–94, was perhaps the most brilliant by far. Earned income during this period increased by 23%, and contributed income skyrocketed by 87%.

Managing, Training, Teaching

POMSA is organized around a director and a student research team of between 6–15 members depending on the case. For POMSA's 1996–98 theatre studies, there were three to five students per four teams. The Round House study used five students. One student—the team leader—was the point-of-contact and was responsible for managing the cohesiveness of the group. The team leader assisted in scheduling interviews and observations and in collecting documents, to make communication with the theatre as minimally intrusive as possible.

Team members' prior experiences ranged from work in the following disciplines, organizations, and positions: regional and community theatre, dance, radio and television, the commercial industry, visual artists and museum professionals, director of an African dance company, and secondary school music teachers. Their education and arts training experiences were from the United States (the Northeast, Southeast, and Northwest), France, West Africa, and Canada. They ranged in age from 22 to their early 40s; some had just entered the arts management field at the time of the studies whereas others had been active members of the Washington, D.C. arts community for more than a decade. They were mothers and fathers with both young children and teenagers; some were former military personnel.

All teams were trained in informal sessions in the following management and qualitative topical areas and issues:

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1. Theatre's understanding of the "community" in which they base their work;
2. Mission statement: significance or nonsignificance;
3. Parameters defining organizational growth;
4. Fiscal stability/instability;
5. Dynamic and transitional leadership;
6. Changing role of boards of directors;
7. Organizational and artistic nurturing and incubating;
8. Organizational life span or evolution;
9. Blurring of the lines between for-profit and nonprofit;
10. Impact of urban revitalization and suburban development;
11. Understanding of outreach;
12. Ethnic, religious, gender, and other cultural issues;
13. Professional versus nonprofessional;
14. Earned versus unearned income;
15. New work versus traditional repertoire and other artistic/programmatic issues;
16. Venues—Facilities;
17. Staff burnout and turnover;
18. Concepts, terminology, and issues related to each theatre case;
19. Assessment/evaluation and the relationship of research to arts practice and policy;
20. Skills of case-study researchers, including listening, lack of bias, and flexibility;
21. Fieldwork communications and relations;
22. Formulating research questions;
23. Interviewing and survey techniques, including asking research questions and interpreting responses for probing and analysis;
24. Anticipation of variations within each site and in collecting data;
25. How to analyze documents from budgets to strategic plans;
26. Observation techniques for board/staff meetings and productions.

Based on training sessions, students were selected for particular cases. The degree of their personal qualities and skills such as creative abilities; orientation to detail; reflective, analytical, and listening skills; oral and written communication skills; self-direction and self-motivation; dedication to and acceptance of understanding process rather than product; flexibility; and intergroup and interpersonal skills were considered in selecting individual team members.

Though training and research instruction naturally integrated themselves once data collection began, POMSA separated these two areas in its initial training. As such, students were required to take a three-credit course on case-study research that was designed around POMSA's four case studies. Course

instruction provided an overview of the theoretical foundations of qualitative research; methods of case study and ethnography through intensive interviewing, observation, and document analysis; approaches to recording, maintaining, and interpreting data via field logs, field notes, and transcriptions; and qualitative data-analysis techniques, including coding, categorizing, development of conceptual themes, and analytic memoing.

Case-Study Questions

The pedagogical approach of POMSA's case study with Round House Theatre was taught based on understanding privatization and the process of it for Round House. Although there were natural discussions about this process in regard to the general nonprofit theatre industry, this process was not the question. Round House's process of privatizing was so complex as to warrant its own study. Therefore, questions sought to understand

1. the theatre's organizational and communication structure prior to and during privatizing;
2. how the decision to privatize happened;
3. how the process differed from initial expectations;
4. advantages and disadvantages of privatizing;
5. the affect on the theatre's season, artistic mission, audience, and outreach;
6. long-term expectations of privatizing in terms of venue, budget, funding mix, subscribers, and audience reach;
7. how priorities were identified;
8. the impact of board development and growth;
9. what options were explored prior to privatizing;
10. the impact on and reactions of the funding community;
11. processes for soliciting contributions from long-term patrons;
12. how fund raising was developed;
13. how the community was informed of the privatization and what their reactions were; and
14. perceptions of the theatre's prior and current roles in the community and of its outreach and education efforts.

This case study, then, served to challenge students to talk about the value of privatization for Round House. Not only did students conducting the case study examine management changes in the privatization process, but the research design made them draw parallels between privatization and the artistic process through, as a core experience, observing theatre productions.

The study incorporated five primary research questions and several sub-questions that students designed. Many questions were common to all inter-

viewees in each site, whereas others were specially crafted, given individual roles within the theatre.

1. Describe Round House Theatre before privatization.
 - a. Describe the mission.
 - b. Discuss the season of productions and education/outreach programs.
 - c. Discuss the facility used for the theatre's productions and programs.
 - d. Describe the theatre's audience and the ways in which Round House has cultivated (marketed) them.
 - e. What was the operating budget and funding mix?
 - f. Describe the organizational, governing, and management structure.
2. Why did the switch to privatization occur?
3. Describe Round House Theatre during privatization.
 - a. What specific steps is the theatre undertaking to become independent?
 - b. What is the current status of privatization?
 - c. How is becoming an independent professional theatre affecting the
 - mission;
 - season of productions and educational and/or outreach programs;
 - facility;
 - theatre's audience and the ways in which Round House is cultivating (marketing) them;
 - operating budget and funding mix;
 - organizational, governing, and management structure.
4. Discuss the strengths and challenges of, as well as the opportunities in, becoming independent.
 - a. What advantages, obstacles, and options were or are encountered in privatizing?
 - b. Is privatizing what you anticipated? Why or why not?
5. What long-range plans are being or will be developed to sustain privatization efforts and the future of Round House Theatre?
 - a. Discuss where Round House sees itself in five years as a result of privatization in terms of the theatre's
 - mission;
 - season of productions and educational/outreach programs;
 - facility;
 - audience and the ways in which Round House will cultivate (market) them;
 - operating budget and funding mix;
 - organizational, governing, and management structure.
 - b. What is necessary to achieve these plans?

Methodology

Three qualitative techniques—interviews, observations, and analysis of documents—served as a framework for discovering insights and findings of the research questions.

Interviews: Two members of POMSA's case-study team (one interviewer and one observer/field-notetaker) interviewed eight people affiliated with Round House for 45-minute to 1-hour interviews. They included the

1. Producing Artistic Director;
2. Chair, Board of Directors;
3. Board Member;
4. Development Director;
5. Education and Outreach Director;
6. Marketing and Public Relations Director;
7. Production Manager;
8. Consultant.

These interviewees were selected based on a purposeful sampling—what qualitative researcher Patton (1990) describes as the selection of information-rich case participants and those most useful to a study.

One team member interviewed while the other focused on observing, note-taking, and probing interview responses. Approximately ten to fifteen interview questions for each theatre were designed as either open-ended and exploratory, or semistructured, depending on the research focus. Questions that were evaluative or opinionated, tricky, overly clever, and leading were omitted. Students were also involved in role-playing activities with the interview questions they had constructed and were given effective interviewing tips. As this was their first experience in intensive interviewing for case research, they were instructed to ask questions only from their interview guide with indirect probes or elaborations such as "Could you tell me more?" "Could you give an example of that?" "Why do you think that happened?" or "Explain that further." Students were also encouraged to use critical incident techniques in interviewing and probing—the best, worst, strongest, or weakest of an issue being discussed. These approaches to probing were important, so as not to involve students in interpretive or analytical questioning until all data were collected. With these and other interviewing techniques, team members were trained in what is considered the epitome of ethnographic research—field observations.

Observations: This method provided team members with direct access to and observation of the interactions of nearly all participants involved with Round House.

Three observations were conducted during the case study: (1) an evening performance of *The Rehearsal* for an observation of the kind of mainstage plays Round House is committed to producing, the audience make-up, and other environmental factors of the theatre; (2) management/executive team meeting; and (3) a staff meeting.

In several class sessions, students learned about their detached roles as observers, in contrast to their roles as interviewers. As such, they were trained to adopt a learner rather than expert approach in observations. Instruction and training also focused on observing everything deeply—the setting; people and their interactions with others; collective as well as individual actions and responses that unfolded (performing, assigning tasks, decision-making, problem solving); the sequencing of events that took place as well as goals that people strove for, tasks that they tried to accomplish, and the emotions that they expressed or perceived to feel. As audiotape documentation was helpful in discerning actual conversations, the very nature of observations are these nuances that taping cannot obviously record. Jotting down important notes, inconspicuously, while remaining attentive to observing are crucial to this form of data collection. They moreover represent the foundation of ethnography on which POMSA's case study design is structured.

Document Analysis: The collection of organizational documents began the process of data collection. Additional documents were collected throughout the research process. The following documents were analyzed:

1. By-laws for FORTE
2. Fact Sheets and other organizational material
3. One year of Executive and Full Board Meeting Minutes
4. Three-Year Plan of Action
5. "The Privatization of the Round House Theatre"
6. Annual Reports for FY 1994–95 and 1995–96
7. Programming, promotional, and publicity material
8. Financial data including financial statements for FY 1994–96 and grant proposals

This series of data collection was accompanied by preliminary data analysis. All team members read and analyzed documents, though one to two team members were assigned this task for the entire group.

Data Maintenance: Data and insights from interviews, observations, and documents were described in full transcriptions of interviews, partial transcriptions of observations, detailed document analyses, and field notes. They were all maintained in student field logs.

Field notes were both descriptive and reflective. Descriptive field notes contained the objective part of the data, or the verbatim accounts (transcriptions and analyses) and facts from each method. Reflective field notes, how-

FIGURE 1. Example of a Reflective Field Note

NO—The board member was angered by the suggestion of a give/get policy of fund-raising.

YES—Though the board member was angry at the idea of a give/get fund-raising policy, by observing other board members, I got the impression, both through some barely audible sidebar conversations and facial expressions, that they were surprised at the board member's outburst. They seemed to believe that a give/get fund-raising policy was needed for the theatre. I need to probe this a bit more with several board members in our interviews next week to determine if my impressions are correct.

ever, recorded team members' thoughts and perceptions about the data from each method (see fig. 1). These subjective impressions described what was thought of, what was meant by, and what seemed likely about the data in each method. In essence, reflective field notes ushered in the first phase of data analysis.

Data Analysis: Data from interviews, observations, and document analyses were distilled into meaningful and essential statements. This process of reduction and synthesis was completed through a four-step process of coding, categorizing or classification, development of conceptual themes, and analytic memoing (Bogdan and Biklen 1982; Ely 1991; Miles and Huberman 1984; Strauss 1987; Strauss and Corbin 1990; Yin 1990).

Students were instructed to search out all similarities, differences, patterns, and major topics within the data in the coding process. In case-study analysis, Yin (1990) defines this process as "pattern-matching" (109). The actual procedure was to organize all data from each method by writing down clusters of significant words, phrases, and concepts that naturally and quickly emerged from and recurred within the data. Reflective field notes also provided clues for coding; codes were then recorded directly in the field log (see fig. 2).

A second synthesizing process narrowed codes into larger categories or patterns that were triangulated through other data. This categorizing process essentially weeded out codes that may not have been considered important and useful to the research questions or have been found in other data and methods.

From the large categories developed from coding, students spent a significant amount of classroom, group, and individual time developing conceptual themes. These themes were the patterns and similarities that were found in the data and that limited data to essential statements. Only several (no more than ten) conceptual themes were written that responded directly to the research questions and focus. Yin (1990) refers to this as an "explanation-building or hypothesis-generating" (113) process whereby essential explanations and the

FIGURE 2. Example of Field Log, Coding, and Descriptive/Reflective Field Notes

FIELD LOG

Name of Researcher(s): interviewer + observer
 Date of Interview: _____
 Setting of Interview: _____
 Name of Interviewee: _____

Codes	Log Entry/Descriptive Field Notes	Preliminary Analysis/ Reflective Field Notes
Nontraditional structure	So, rather than reporting directly to the Executive Director as we did under the old structure, each of us who heads a function—Development, Marketing, Education, and Business Directors—comes together and interacts directly with the board once a month. We don't consider ourselves to be "reporting" to the board; we just share our work as directors with them.	Looks as the theatre has operationalized their new structure—Probe more with her—how the board feels about this as a possible ?? managerial function for them. What does this mean for the ED position? Is it really necessary now? Probe about what seems to be an increased role of the artistic director. Also probe for "staff empowerment" as a result of new structure.
Flattened hierarchy		
Collaborative		
Sharing		

Coding = the interviewer/observer's few-word synthesis of the meaning of the interviewee's statements noted in the log entry—codes later help in weeding out data that are not essential to the study. Instead of looking through hundreds of words in the log entry, the interviewer/observer can let the codes act as filters. Codes that have the same or similar meanings as keywords in the research question are then developed into categories and conceptual themes, which represent the "essence" of the data—reducing or distilling the transcript to essential information.

Log Entry/Descriptive Field Notes = the verbatim transcript of interviews, and verbatim or partial transcriptions of observations and document analyses.

Preliminary Analysis/Reflective Field Notes = the interviewer/observer's initial hunches about the impressions and interpretations, as well as the meaning, of important areas of the transcript—questions that may emerge from these interpretations are also mentioned here to indicate what new or additional information is needed for a thorough understanding of this section of the transcript.

development of ideas are the goal. This process represented the beginning of theory development. Students wrote eight conceptual themes for the Round House case:

1. The privatization process entailed continuous planning and re-evaluation by Round House's staff and board.

This process of re-evaluation led to organizational restructuring with the addition of staff positions and the reorganization of responsibilities of current positions. The process of deciding to adopt a new organizational structure was not an easy or quick one for staff. Heidi Onkst, Development Director for Round House explained:

[This] was very difficult for Jerry, because Jerry was reading about all these artistic directors now hiring managing directors. It was difficult to say, "I'm going against it. I'm not hiring a managing director. I'm establishing a management team. . . ." What that really boils down to is a whole new way of running an organization in a structure that is not, the command is here [at] the top, and all the little people down here doing the work.

2. The theatre's management structure has shifted from a traditional, top-down structure to a flattened management team structure. The new structure was facilitated by the unexpected departure of certain staff but became an unanticipated benefit of the privatization process.

The staff, particularly Whiddon, was willing to build a new paradigm in light of the company's re-evaluation and planning. The new paradigm included operating without a managing director and restructuring the operation of the theatre as a management team, Whiddon stated. Additionally, and later, the position of general manager, who would be responsible for oversight of the work of the management team, would be added. The team consists of six staff members, including the producing artistic director, business manager, development, marketing, and education/outreach directors, and the production manager.

Reconceptualizing the managing director's position as that of general manager is a model that is less bicameral than in many theatres. Although Round House's new structure is more geometric, stated Whiddon, it maintains that the producing artistic director, with all his attendant responsibilities, is the theatre's top priority. This concept was described concisely and visually by McCann:

The professional staff took over the leadership of the company [with] . . . staff leadership and Jerry [the producing artistic director] near the middle of the organization. . . . The center is an individual whose life is given to the choosing and delivering of artistic work, and that's Jerry. Around Jerry are the professional staff—we're calling it now, the management team, for lack of a sexier word. Those people and Jerry work together as a team. One thing you'll notice missing from that team is a managing director. I think that's one of the beauties of

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this, is a recognition that we've moved into the post-manager era. We don't need managers to tell people what to do, we need people who know what needs to get done and assimilate in some way to get that done. . . . This is the beginning of a set of concentric circles within the organization.

3. A new approach, in terms of the work of the Board, is in the future of Round House as the new management team works to implement a Board approach that will better serve the theatre.

Under the auspices of the county government, Whiddon described Round House's board-like entity as a "mom and pop organization." Though not a board in a formal or legal sense, the Friends group functioned as "a group of community-interested audience members who were supportive . . . and came to meetings, and loved the theatre," explained Board Chair Peter Jablow.

But when the theatre received its equity contract during the late 1980s, the role of the board increased. The decision to become independent meant that theatre leaders were increasingly involved in developing the membership of the board. Since September 1995, Whiddon indicated that the relationship of the board to the theatre has

changed tremendously. . . . We have seen that the conventional relationships of a board to a nonprofit, as it has been since the early 60s, is no longer workable. . . . It goes back to the focusing on nurturing those relationships in the community and developing ways of getting fiscal resources out of the community in a constant way.

Under the new management structure, Round House has made the relationship between board and staff an active and involved one. Education and Outreach Director, Kathy Feininger, described this relationship: "The management team is now answerable to the board [for] the decisions that we make."

McCann described the theatre's new approach in viewing the role of the board in relation to the management team. Having described the relationships among staff in the new management model as a set of concentric circles, McCann further described the "third circle . . . [as Round House's] view of the community from outside," or its community leadership council, as he believes the board, under this new approach and model, should be appropriately called.

That next layer . . . is members of this management team and members of the community forming this leadership core in the organization. Probably from a legal point of view, [it] will become the board of the organization. . . . [This] third piece of the equation is the larger sort of set of circles that sit outside of that—the community itself. We have now labeled this loosely, the community leadership council. . . . These "volunteers" will be leaders in that effort, not supporters. . . . The professional staff will, then, support the work that they do. We've sort of turned the relationship around, hopefully . . . None of us feel that is perfect, because everyone is open-minded enough to believe that there is not a perfect structure that people can work in. . . . We don't really use the term structure. We call it an approach. . . . It's a matter of trying to set up an approach

that amplifies what each individual has to offer. Before, it was to get boards off our back, which is a very superficial way of viewing it. This . . . represents a set of changes that I think all organizations are going [to eventually operate under].

4. Strong communication was necessary to facilitate many of the changes throughout the privatization process.

Prior to the adoption of the theatre's new management structure, communication between staff was centrally facilitated by the managing director, stated Mark Blackmon, Marketing and Public Relations Director. The new structure, however, blurs the lines that have facilitated more communication among staff. Blackmon added:

[Prior to privatization], most everything was fairly much set from the managing director, and that was your point of contact for all information. In this period [with the management team approach], contact is made through the department heads on a codified basis weekly in either a management team meeting or in a staff meeting. . . . There are very few, I would say, defined boundaries between the departments.

5. Programs cut during the privatization process are a major concern for most of the theatre's professional staff, as they come to terms with the importance of outreach to the mission of Round House.

Privatizing the theatre meant cutting nonrevenue-producing programs that were essential to the mission of Round House and that had been its history of community theatre. With these roots in Street 70, in particular, the loss of integral programs prompted concern for the commitment to the theatre's mission by staff.

Before privatization, the county absorbed a significant part of the theatre's outreach expenses. As a result of privatizing, many outreach programs are now held in sixteen separate and rent-imposed facilities throughout the county, disconnecting them from Round House. In fact, Feininger added that now, much of the costs of education and outreach are exorbitant. "As soon as we privatized, then I became a tenant. . . . The cost of doing our programs skyrocketed."

The financial difficulties that Round House has had to endure as a result of becoming independent, particularly in the area of education and outreach, can be centrally tied to the loss of county subsidy. Moreover, the lack of classroom space means that revenue expansion for these programs—programs that are oversubscribed and in increasing demand—is curtailed. This revenue, stated Production Manager, Joe Musumeci, represents a significant percentage of the theatre's income base.

To not perceive these cuts as a deficit in terms of the theatre's total offerings was difficult for many staff members. Hence, many of the programs that were cut as part of the theatre's independence from county auspices are slowly being phased back into the theatre's programming.

6. Space is an important issue for Round House as theatre professionals explore the relationship between the theatre's location and its audience.

Currently, the theatre is housed in the basement of a Montgomery County government building. They have a mainstage that seats 216, one small office area, a green room, and a multipurpose room. The theatre is hampered by not being able to expand programs because of the lack of space. Consequently, the potential for earned income through tuition revenue is thwarted. Both mainstage and classroom capacities have to be expanded for the theatre to increase its revenue base.

Having been previously under county auspices, the cost of overhead has not had to be a priority for Round House. But the lack of visibility, accessibility to the Metro, and proximity to other community entertainment venues such as restaurants in the current county space are increasingly becoming a concern for the staff and board. Ticket sales and the attraction of new audiences who enjoy an entire night out, including dinner, theatre, and drinks, are hindered by the theatre's location.

Nearly everyone interviewed expressed that Round House's space and location are the theatre's primary challenges. McCann explained that

[The stage is] very small. . . . Joe [Musumeci] does wonders. But they need a larger stage house. . . . They need costumes, scene shop. . . . They rent space now and have to truck things around. . . . The outreach and educational programs are totally dependent on space the Round House doesn't control. But if you centralize the programs in one building, they don't get disbursed throughout the community.

Though a full house is not consistent during runs, many believe that this problem is attributable to the theatre's inaccessible location. Some interviewees suggested a larger space for the theatre's mainstage season—between 300–400 seats—with more aggressive marketing for audiences.

7. Marketing, in the form of promotion, image, visibility, and advertising, should become a lead priority for Round House's survival as the theatre moves to broaden its community relationships and accessibility.

Prior to the theatre's decision to separate from county support, the county funded Round House's shows. As a result, ticket sales were a low priority, and the marketing of audiences for such sales was equally a minimal priority for the theatre. The marketing of the theatre's plays and programs that did happen was undertaken by the county.

But since the decision to become an independent theatre, Round House managers have had to develop a more aggressive approach to marketing. Though Blackmon mentioned that the theatre targets the same Montgomery County audiences as it did under county auspices, "ten years ago . . . it wouldn't have mattered if we filled the house every night or not. Today, it's essential that we keep building our audience and keep developing new audiences."

McCann suggested that, in developing audiences, Round House should also be engaged in gathering insightful community information about how audiences are attracted to the theatre. This information, he suggested, would be particularly helpful if it is qualitative and descriptive. He cited as an example:

They need to gather community information. But, I would argue that's not just quantitative information. It's gathering a lot of feeling from people. What's it like to go here. What's it like to find out you have a theatre in your midst and you've never heard of it before.

8. The leadership style of the producing artistic director has greatly enhanced the ability of the staff, board, and the entire organization to adapt to the changes involved in becoming an independent theatre.

Everyone interviewed had high praise for Jerry Whiddon. Jablow described Whiddon's style of empowering staff and board members in their job functions, while instilling a sense of ownership for the work they do:

He pushes people to go ahead and make decisions for themselves—watching them, instead of trying to hold on to authority—to allow people to grow. You will find that some of the most successful people displace their egos and empower people to grow. . . . In a company like Round House, I don't think you would succeed as well as Jerry has if you had a huge ego and everything had to run through you. You'd fall under the pressure by this time. Or it would lose its luster very quickly.

Whiddon's leadership, without a doubt, has greatly enhanced the ability of the staff and board to adapt to the changes of privatization. McCann viewed this as an advantage for Round House. Whiddon's long tenure at Round House is an advantage for the theatre "because not only have you had the continuity of his leadership, but at the same time, [he's] provide[d] a whole body of work that wouldn't get done in Washington, otherwise . . . that body of work has been the community programs."

Following the development of the above conceptual themes, students were engaged in a concluding process of data analysis—analytic memoing. Analytic memoing is a summarizing process that synthesizes data from each method, forms the emergent and essential ideas of the data, and begins the final data analysis process (see fig. 3). The memos include conceptual themes, interpretations, perceptions, speculations, and material from field logs. In the case of Round House, the above descriptions that follow each conceptual theme were included in analytic memos.

Team members wrote analytic memos as short accounts of the meaning of the data through each method. In the memos, the team members stated and elaborated on their conceptual themes. Analytic memos triangulated all data and referred to where statements, interesting quotes, and other support for conceptual themes may be found in field logs. The memo, then, served as a

FIGURE 3. Example of Statement from Analytic Memo

Each of the staff members—Managing, Development, Marketing, Outreach and Education Directors, Business Manager, board members with the exception of one, and the Artistic Director—seems very committed to making the new circular and nontraditional organizational structure work (Document Analysis Log #5, Lines 562–98). As such, there was nearly a consensus of this new privatization structure among staff and board. Buy-in, for the most part, was achieved. See Observation Logs #2 (lines 345–411), #9 (lines 211–40), and #4 (lines 198–211). See, particularly, Interview Log #9, Lines 230–36 for a great quote!

starting point for final analysis and provided material for the written case study.

Qualitative researchers suggest various ways to provide for trustworthy or credible accounts of a qualitative study (Ely 1991; Lincoln and Guba 1985; Tesch 1990). These methods, to be conducted during the final stages of analysis, also represent another way in which we designed our case studies to involve, in as participatory a manner as possible, the participants of each theatre site.

Prolonged and persistent engagement involved spending sufficient time with Round House for a continuous examination of data. The result of this process was data triangulation. The goal of *triangulation* was to achieve redundancy of data through each research method. It was, therefore, a process of validity- or cross-checking of data to see where the results of each method overlapped. *Peer checking/debriefing* allowed research team members to discuss their insights of case results with one another. In research terminology, this is referred to as establishing inter-rater reliability. In lay terms, however, the two-heads-are-better-than-one axiom is the decoded definition of this technique. *Member-checking* provided team members and POMSA directors with an opportunity to return to Round House and to check final analyses with theatre managers for accurate accounts of the study. The process also involved double-checking factual information, probing more from an interview and observation response or insight, verifying or probing information from document analyses, or asking a new question that emerged during the course of study.

Conclusion

POMSA's method has provided benefits to students, arts organization managers, and arts management instructors in its partnership.

1. Students are involved in conceptualizing and conducting a longitudinal study.

2. Course credit can be offered to students by adopting the case approach as a research methodology course.

3. Students are provided with a "real life" problem-solving situation.

4. The arts management instructor is equipped with current and comprehensive studies for classroom use.

5. Case studies can be included as part of a faculty member's research agenda.

6. The arts institution is presented with an objective and comprehensive perspective on organizational functioning at nominal or no cost.

Involving students in the design of a case allows them to understand deeply the issues of the organization under study—by interviewing staff, board members and volunteers, observing productions and events, interpreting organizational documents, analyzing all of this information in-depth, writing the case study, and discussing intersecting questions and implications useful for classroom discourse. POMSA team member, Bill Cole, summarized implications of POMSA's case study approach for teaching and learning: "We would spend almost as much time talking about the implications of this process on the study of arts management, as much as we would talk about what we were actually finding in the case."

Although this approach may not fit all arts management classrooms or courses, it offers possibilities for how we might extend our discussions of curricular content in arts management education to include a focus on pedagogy. Akua Femi Kouyate, a POMSA team member, explained:

While POMSA's case studies are not necessarily models, they certainly give us information in terms of understanding *how* people work—what works for them, *how* they make changes over a period of time. POMSA's cases don't act as models for us, but they offer information that *informs* us.

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