

**THE PERFORMING ARTS VALUE CHAIN:
A FRAMEWORK FOR EVALUATING UNIQUE PARTNERSHIPS**

Presentation to:

The Seventh International Conference on
Arts & Cultural Management
Milan, Italy
June 29-July 2, 2003

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INTRODUCTION

Not-for-profit arts organizations are increasingly considering outside partnerships as a means of meeting important objectives (Scheff & Kotler 1996). While collaborative ventures show promise for addressing challenges in this sector, these types of relationships have generally proven to be an unstable organizational form (Das & Teng 2000; Gulati, Khanna & Nohria 1994); as well, some have also questioned the actual value that can accrue to arts organizations specifically (Freedman 1986). Disciplined thinking is needed to consider the possibility for partnerships that genuinely help—rather than hinder—performing arts organizations.

The purpose of this paper is to present an organizing framework, the performing arts value chain (PAVC)¹, focusing on the generic activities of the performing arts organization. The framework will then be used to analyze the relative merits of entering unique partnerships with other organizations, including government, education, business, not-for-profits, as well as other arts groups. Finally, actual case examples will be presented to illustrate the PAVC in action.

THE PERFORMING ARTS VALUE CHAIN

To begin, we categorize the work of the performing arts organization (PAO) into two types of activities, primary and secondary (See Exhibit A). Primary activities must occur in some form for any performing arts event to take place. Secondary activities either support and/or hold together primary activities.

¹ Adapted from the Value Chain in business strategy, Porter 1985

A. Primary Activities

The primary activities of any PAO include programming, personell, production, and promotion. Whether it be the work of an artistic director, conductor, or choreographer, *programming* includes the selection and overall interpretation of artistic work. Due to the live nature of the performing arts, the core *personnel*—dancers, musicians, actors, singers—are the essential building blocks of any performance. Efforts to communicate a performing arts event to a potential audience and admit them to the presentation space is defined as *promotion*. Finally, the physical requirements for rehearsal and performance are labelled *production*. In combination, these activities are the four essential building blocks of any performing arts event.

B. Secondary Activities

Secondary activities support and hold together the primary activities (see Exhibit A). The relative form of these functions varies significantly from one PAO to the next, with individuals often carrying multiple responsibilities, particularly in smaller organizations. *Governance* includes the overall guidance and oversight of the organization, typically in the form of a board of directors. *Administration* is the top management, and includes each of the functional areas within the organization (i.e., human resources, accounting, finance, technology). *Fundraising* refers to all efforts to garner resources (other than box office receipts)—government, corporate or individual—including grants, donations, subsidies, payments in kind, etc. Finally, *outreach* includes those efforts specifically designed to bridge into the communities where arts organizations perform or reside. The dotted lines in the diagram communicate that secondary activities may relate to a specific primary activity, or to the organization as a whole. For example, human resources efforts may deal specifically with performers (*production*), or they may be relevant to the organization as a whole.

Further, while not indicated in the diagram itself, it is assumed that PAOs have the choice of performing primary or support functions either: a) within an organizational umbrella (hierarchy); b) through a collaborative relationship (partnership); or c) an arm's length transaction (market). For example, when considering its needs for a performance space, a dance company could: 1.) own its own stage/theater (hierarchy); 2.) maintain an ongoing relationship with a particular theatre space, including such things as priority scheduling, and common promotional efforts (partnership); or 3.) find the theatre space that meets its needs every time a new performance comes up (market). With the exception of governance, virtually every function in the PAVC can take one of these three forms (hierarchy, partnership, market). We now turn to the final section of the PAVC, that of reputation.

C. Reputation

The claim has been made that for nonprofits, “reputation is everything” (Austin 2000: 77). Arguably, an even more compelling case can be made for the specific case of performing arts organizations. Given the uniquely sensitive dynamics related to audiences, donors, and other stakeholders in this sector, all activities represented in the PAVC are indicated to have an impact on reputation.² This model evaluates the effectiveness of each value chain activity by its overall influence on reputation—either positive or negative.

The importance of reputation is a highly complex topic and one that has garnered significant attention related to many different types of organizations (Roberts & Dowling 2002), though some work has been specifically focused on performing arts organizations (DiMaggio 1987). To operationalize reputation for the PAVC, the “Criteria for Holistic

² Note that in the original Value Chain Model (Porter 1985) profit margins are inserted in place of reputation as the “bottom line” evaluation of the primary and secondary activities of the for-profit business firm.

Assessment” of arts organizations developed by the Canadian Conference of the Arts (Harvey 1999), defines three major PAO dimensions: 1) artistic merit; 2) contribution to community; and 3) organizational effectiveness.

1.) Artistic Merit

Defining a generic statement encompassing all aspects of artistic merit in the performing arts would be an impossible task; the question “what is quality in the arts?” has been an unresolved debate for most of history (DiMaggio 1987). Nevertheless, artistic merit is a central issue for any arts organization to grapple with. We leave it as a highly context-dependent concept of quality involving a complex combination of medium-specific standards, personal interpretation, peer review, media critique/visibility, organizational association, audience impact, community need, etc. Whether an arts group or a particular performance has artistic merit must be directly related to the characteristics and goals of the organization which may be far flung and varied. What’s important in the context of the PAVC is that members of individual arts groups have a good sense of what constitutes artistic merit to their organization and it’s stakeholders, and are able to articulate it in a meaningful way.

2.) Contribution to Community

Drawing from Harvey (1999), contribution to community is operationalized as: “the quality of the organization’s interaction with the public, the engagement and participation of its community, the quality of the education, outreach and audience development actions of the organization, and its responsiveness to the diversity and variety of its community” (45). The rationale for community contribution is that the performing arts need to matter to people (other than the artists directly involved). The way that a particular group or presentation interacts with an audience is very much related to artistic merit. Artistic

statements may inspire, give pleasure, and gratify; they may also provoke, rage or protest. The point is that the art matters to a particular community, and that its relative importance can be articulated in a meaningful way.

3.) Organizational Effectiveness

Finally, organizational effectiveness is defined as “the ability of the organization to achieve its mandate, the quality of its management of its human resources (staff, artists, managers, board), its success in controlling expenses, generating non-government revenues and using its monies to best effect, its ability to anticipate, plan for and take positive actions to manage change successfully” (Harvey 1999:45). While organizational effectiveness seems to have the least of the three to do with art (the same description could be used for almost any organization), it is actually very much intertwined with the other two. For example, the ability to garner appropriate resources for longer term viability will often depend on how stakeholders judge either artistic merit or community contribution, or both. Nevertheless, an independent dimension which regards making appropriate judgements around management, people and resources, can be specifically isolated for individual organizations particularly focusing on their longer term viability.

An examination of interrelationships between the reputation dimensions of artistic merit and community can be useful (See Exhibit B). As indicated in the 2x2 table, it is proposed that an organization can maintain one of four positions on the matrix. A theatre group, for example, could stage a very high quality cutting edge performance, but fall flat on both attendance and support if there is little community connection. Such a performance would occupy the lower left quadrant and be operationally vulnerable for drawing the necessary resources for ongoing ventures. An example of the upper right quadrant could be a dance troupe formed by a cohort of students, which might be very popular amongst a

group of enthusiastic peers, but may not be able to extend beyond that group due to quality and resource constraints. The weakest position is the bottom right hand where the PAO demonstrates both low community and low quality elements. Such a group is likely to not maintain viability except in the very short run.

The strongest position on the matrix is achieved through a both a robust sense of artistic merit as well as a solid community connection. Maintaining such a position is difficult, particularly as resource commitments may represent either-or decisions. For example, would an orchestra favour an artistic director with superior conducting skills but little sense for community, or one with good (but not extraordinary) conducting skills and a strong community orientation? Finding the appropriate balance between these commitments represent some of the important challenges facing performing arts groups.

Many PAOs also look to partnerships to achieve better positioning and balance between artistic merit, community contribution, and organizational effectiveness. Executed properly, partnerships can enhance strengths and reduce weaknesses, putting PAOs on stronger footing. Done poorly, or for the wrong reasons, partnerships can distract arts groups away from their core vision and potentially weaken the organization in the long run.

PARTNERSHIPS AND THE PAVC

The variety and number of potential performing arts partnerships is almost limitless, though the most appropriate and exceptional opportunities for such collaboration may be much more rare. As such, PAOs should carefully consider such relationships and potential alternatives before committing valuable time and resources. Collaboration can be very difficult—success stories are often trumpeted to the world, while the more frequent failures are often swept under the carpet (Das & Teng 2000). With the amount of time spent

making such arrangements work (or getting along when they don't), and with a potentially high risk of failure, some disciplined thinking about partnership can be highly valuable. The performing arts value chain (PAVC) is proposed as an analysis tool for evaluating potential or existing partnerships.

Three general steps are suggested for working with the PAVC in evaluating a potential partnership: 1) define what specific value chain activities will be involved; 2) consider linkages with other value chain activities; 3) define the impact of the partnership on reputation. Each of these will be discussed in turn.

1.) Specific Value Chain Activities

As a map of the organization, the first use of the PAVC is to specifically define the activities, primary or secondary, which will be affected by the partnership. This diagram helps to ensure a comprehensive appraisal of what will be entailed in the relationship, to clarify assumptions, and to provide definition to the project. Without a clear understanding of each of these, collaborative ventures remain nebulous, and therefore difficult to evaluate. Also, a comprehensive look at the organization can generate ideas that might not have been otherwise considered.

2.) Linkages

Linkages are the relationships between different activities within the value chain. For example, a proposal to share a new venue space (*production*) with another performing arts organization could require a dedicated joint capital campaign impacting existing *fundraising*. As such, the specific linkage between the two activities would need to be considered in addition to each independent effect. As illustrated by the prior example, linkages can be present between primary and secondary activities. Additionally, linkages can exist between primary and other primary activities or between secondary and other secondary activities.

3.) Impact on Reputation

Finally, the partnership can be evaluated based on the impact the change in activities will have on reputation—artistic merit, community contribution, and organizational effectiveness. In some cases trade-offs have to be considered and the ultimate value of the partnership will be judged based on the net improvement in positioning. The 2x2 matrix (Exhibit B) can be helpful when an organization understands where its current position lies and where a potential partnership could lead it. For example, an organization which is high on community contribution but lower in the quality of its productions, may seek a partnership particularly focused on boosting quality. Naturally, organizational effectiveness will have to be considered taking into account the degree of resources necessary for such a partnership and with the broader positioning of the organization. We now turn to some examples of partnerships which illustrate the PAVC in action.

PARTNERSHIP EXAMPLES

A. Orchestra-Museum Partnership

This partnership involves a baroque orchestra (BO) and a natural history museum (NHM). From a *value chain* perspective (see Exhibit C), the BO was looking to expand its *production* within 5 years, moving from a church venue where it has maintained a relatively small but loyal and enthusiastic audience, to a world class concert hall with much larger capacity and improved production values. Further, the BO was looking to reduce the extensive amount of international travel it had been doing. In anticipation, the BO wanted to expand its local audience. The problem they faced was with *promotion*. With their own data base of attendees, they had great success in generating repeat subscriptions and garnering annual donations. Results in trying to expand to the broader public were

“nonexistent” (Unrau 2002), however. In order to effectively reach out, it would be necessary to provide people with some kind of experience that would entice them into the concert hall. In the words of the BO managing director “. . . you can send a million-trillion brochures out and not really reach anybody; it’s much more effective to connect the art with the people. . .” (Unrau 2002).

With this in mind, the partnership was proposed to present two pilot test concerts in the NHM space. From a *production* perspective, the actual physical location of the NHM allowed the BO to expand its scope across town into a new geographic area, making it accessible to a new market. From a *promotion* standpoint, the NHM advertised the concerts through its regular channels including a feature article in its member’s magazine with a subscriber rate of over 25,000. BO manager: “. . . our objective was not only to do concerts for large audiences but also to work with partners that already had a pre-existing communications infrastructure. . . (Unrau 2002).”

From the NHM side, the hope was to attract people into their space with a special offering: “. . . their objectives were to animate the space with live performance activities to attract people who had gone to the museum as children but figured they had seen the dinosaurs and didn’t need to return as adults (Unrau 2002).” While the NHM had maintained a wide reputation, many of its members were apathetic and needed coaxing to return.

The results of the pilot concerts were hugely successful. Approximately 3400 people had exposure to the two initial performances (at no charge beyond their museum admission fee) while also availing themselves of the NHM offerings. In some cases people only stopped to listen to the music in passing, while others enjoyed the entire performance. Numerous brochures were passed out providing background to the BO and inviting them to

upcoming performances. Immediate plans were put into place to expand the pilot into a series and existing plans are to present six similarly-formatted concerts in the upcoming season.

From a cost perspective, neither partner had existing budgetary funds to cover expenses of the production. For the pilot, the BO donated a concert (their musician's agreement allowed for one free community concert per year), making it technically an *outreach* effort initially. To cover the proposed concert expenses (expanding the NHM into regular *production*) a foundation grant was sought, based on the case that this effort was strategically important in their audience-building efforts, thereby involving linkages between *production, promotion, and fundraising*.

Moving from the primary and support activities of the performing arts value chain, we now consider the impact the partnership has had on *reputation*. Considering *artistic merit*, the existing reputation of the BO is extremely high—boasting an impressive list of high-profile awards for recordings, extensive invitations for prestigious international performances, and a loyal audience base. An interesting irony is that, except for their loyal local following, the BO may be better known internationally than in its own city. A case could be made that they gravitate towards the lower left quadrant in Exhibit B.

In a move to expand its local audience base for a new concert hall and reduced touring schedule, it was necessary to broaden its local *community* presence and visibility. This partnership enabled it to do so. “We ended up reaching much more of the community than we did before. . . they would pay the entrance fee but no ticket fee making it completely accessible. People can wander in and out and if they're with their families they can stay for 15 minutes and go. Kids were dancing around the stage to some of the music. Our

musicians were great in that they would stay after and explain what the harpsichord is all about. So it's a very friendly environment (Unrau 2002)."

It should be noted that some sacrifices to *artistic merit* were encountered in the process.

We had some challenges acoustically; because of the dinosaur exhibit some people could not hear the concert so we've got some logistics to work out . . . we're playing in an uncontrolled environment where people are walking in and out. We have soft instruments by the nature of how they are built. Throughout time instruments were built with more and more tension producing more volume. With large exhibits and a lot of noise from the rotunda it's provided a lot of challenges. And anything we do we want to do at a very high level and we were disappointed that we weren't able to provide the best experience for the audience. So we have to look into more technical solutions to make sure that people go in there and they're not frustrated that they can't hear (Unrau 2002).

It appears likely that the logistical problems with the acoustics and the venue threatening *artistic merit* will never be completely worked out. Nevertheless, given their position on the matrix (see Exhibit B), a reasonable tradeoff would be to sacrifice a little on acoustics (*artistic merit*) for the gain in *community*. It can also be hoped that those who are exposed to the music see this as a starting point in their association with the BO, and seek them out in other more acoustically suitable venues.

From an *organizational effectiveness* perspective, the pilot test concerts had an unexpectedly positive immediate impact. Within a week there was a spike in ticket sales to the next regularly scheduled BO concert—Handel's Water Music—with people reporting (based on box office inquiries) that they heard about the concert through their visit to the NHM. The same pattern continued with successive concerts and with this short term success, the positive longer term impact appears highly likely enabling the orchestra to manage the upcoming changes to its production. From a resource perspective, therefore, it has been relatively painless, though not without some administrative coordination setting up the venue, booking the concert, and applying for the special grant. Otherwise, the increased resources—both in short term ticket sales, increased performance opportunities, and longer

term market expansion—proportional to depleted resources, would have to be considered a successful demonstration of effective management.

B. Theatre-Social Service-Corporate-School Partnership

The second partnership example includes a theatre company presenting a socially-charged play based on the themes of hatred and racism, as part of its regular season. The production included a young man described as a neo-nazi, skin-head being accused of hate crimes and his interaction with the Jewish lawyer assigned to his defence; In anticipation of the play the theatre management was looking for ways to have a deepening impact on the community. Discussions with a local social service organization generated the idea of building on an existing anger management group program that could be presented to classes of high school students, incorporating a viewing of the play as an integral part of the program.

The theatre company contacted one of their existing corporate sponsors with the idea of gaining additional support to fund this educational program. With adequate support in place, a coordinated effort by actors, counsellors, and teachers, delivered the program to an over-subscribed school base, creating a need to extend the play's run and resulting in a very broad exposure across the city and beyond. Current plans are to build a socially-relevant play into the fall season every year and duplicate this process annually.

From a *value chain* perspective (see Exhibit D), the partnership produces an important linkage between *outreach* and *programming* in that the artistic director will keep a socially-relevant theme in mind for play selection that will be appropriate for student program purposes. From a *fundraising* standpoint, the program provides an opportunity to further deepen the relationship with the corporate sponsor, making it more meaningful, interactive and with greater dimension. At the time, the corporation was a regular play sponsor and

had been approached to make a substantial contribution to a capital campaign to build a new theatre (roughly eight times their annual giving level). One concern could be that yet another request for funds would stretch the relationship too far. In fact, the opposite effect happened.

They love supporting programs that make a difference in the community and they said this program was perfect; that it had all the elements of something that they could stand behind. So there was a synergy, I suppose, in supporting our capital gift but this stood out on its own regardless of anything else they supported. They loved it and they want to do stuff like this in the future (Preece 2001).

Another important PAVC linkage is that between *personnel* and *outreach*. With actors actually taking part in the social service program delivery, their role as artists and social-program facilitators blurs. Out of this combined role emerged some interesting happenings. For example, there was the discovery that “. . . many of the processes around dealing with anger management are very similar to what actors have to go through in developing their roles as performers. So there was a great synergy between the two experiences (dealing with anger and “becoming” a character) (Preece 2001).”

In the area of *promotion*, a cross-section of students receives exposure to the art form and this specific theatre with the potential for future audience development. Similarly, the parents of student participants receive exposure to the work of the theatre. From a *production* perspective, the program-related performances expand the demand for the play substantially to accommodate the student audiences. This increased demand can also be absorbed in non-peak hours, as student performances are presented during the day.

Looking at *reputation*, the contribution to *community* is substantial with meaningful connections with numerous stakeholders (as already discussed). While the relevance to community seems the most intense, there is also an impact on *artistic merit*. A slogan promoted by the company to produce “necessary theatre” and this particular program helps

to reinforce the specific artistic merit goal of presenting plays that matter to people—the process of reaching out to school-aged community embodies that artistic ethos.

“Counsellors and teachers agree that multiculturalism, hatred, and racism are all issues that students face every day and so for them they were so excited about approaching the subject. . . it just helped the students open up in a way they hadn’t been able to do before” (Preece 2001).

Considering *organizational effectiveness*, the program encountered some difficulty regarding resource allocations. The coordinating, acting and facilitating responsibilities proved to be unwieldy for individual actors, taking a personal toll. Initial plans were to run 6 workshops dealing with 80 students. “But as soon as the schools found out about the program we were just inundated with requests and we ended up doing 16 workshops and almost 500 students and their teachers came to see the show and were involved in the program” (Preece 2001). There was also a substantial effort to measure and track the impact of the program and report back to the sponsor: “. . . we promised that we would report back to them as they had communicated that to be important to them, to see the results and to track the learning by the students. . . we worked hard for this gift” (Preece 2001). The overall result of these efforts was that it put a huge stress on the existing resources of the organization. The solution to this initial conundrum was to hire a dedicated education coordinator, bolstering this part of the value chain. It is anticipated that this organizational adjustment will enable this type of program to become institutionalized into the working processes of the theatre, as defined already in the PAVC.

C. Canadian/British Theatre Partnership

The final partnership to be considered is an exchange agreement between a Canadian theatre and a British theatre (see Exhibit E). From a *programming* side, the relationship

involves the commissioning of six plays, three Canadian and three British, with all rights accruing to both companies. Actors from both countries (*personnel*) are enlisted for all 6 plays, providing touring opportunities, extended runs, and international exposure. For *promotion*, the international exchange aspect becomes an essential marketing component. “As Canada's largest not-for-profit contemporary theatre company, Theatre X is committed to the creation and production of the best contemporary theatre in the English-speaking world, attracting the best artists and plays in Canada, and promoting Canadian productions in international markets” (company promotional materials). The international element of *promotion* works in two ways. The first is that Canadian plays draw international acclaim, receiving significant exposure in prestigious locales, such as London. This promotes well to Toronto audiences which often see foreign accolades as artistic validation for homegrown talent. The flip side is that Toronto audiences gain first-run exposure to internationally-recognized foreign plays.

With *production*, there is the obvious increased geographic scope, which includes the sharing of props, sets, and wardrobe—though obvious individual contexts require adaptations. A linkage between *production* and *fundraising* occurs given the diplomacy goals of the government to promote Canadian culture worldwide. International travel grants have become a necessary element of making this partnership financially viable. A further linkage occurs between *production* and *programming* in that plays are commissioned and written with an international release in mind, providing instant international exposure for the playwright. “So that’s part and parcel of our strategy to get as many of our own artists up and out of Canada; to look for other ways in which their/our work can be profiled. To open up avenues not just for us in terms of the artists, but also to establish creative relationships with companies so that we can bring in their work as well” (Unrau 2001).

An important PAVC linkage exists between *administration* and all the *primary activities* in that working this kind of partnership requires a substantially different management mindset as well as infrastructure. On the negative side, coordinating all of the value chain activities from two locations in different parts of the world in different time zones can be very difficult—“the logistics are a challenge as people have different schedules, the time difference, the travel difference, which all makes it very, very expensive . . . we have the challenge of pulling a cast from two different communities, getting them to work together as one company, as well as all the administrative stuff such as visas, work permits, travel documents, blah, blah, blah” (Unrau 2001). On the positive side, each party gets intimate experience with artistic professionals from another context. “From a creative point of view it’s great to see how other people work because the British do work very differently and it’s great to see them in a working mode approaching the work in a different way” (Unrau 2001).

For *reputation*, the sense of *artistic merit* receives international legitimacy through the partnership dynamics already discussed. On the downside, distance elements may actually strain the traditional methods of achieving *artistic merit*. Regarding the process of working with commissioned works in different countries: “It’s very difficult to shepherd it along; there are a million reasons why the deadlines can’t be met and they are all creative. . .” (Unrau 2001). As such, the physical distance results in potentially greater uncertainty with respect to timetables and scheduling, but also with the type and quality of the plays that are written. With organizational effectiveness, resources are strained due to distance and logistics. Nevertheless, there is some leveraging of resources which enable shared expenses on specific items (commissioning of plays and rights to production). From a longer-term strategic perspective, the exchange enables exposure and access to important organizations and locales. “Regardless of whether we produce any of the playwrights that we have

commissioned, we now have a very, very good solid working relationship with a major British theatre. With that we have a road into the West End in London which is a market the we've always wanted to crack" (Unrau 2001).

DISCUSSION AND CONCLUSION

The intent of the PAVC is that it be used as a tool to consider the merits of important decisions facing performing arts organizations. This paper has used the example of unique partnerships to illustrate an application of the framework. The PAVC initially pushes the arts manager to consider the entire range of PAO activities—primary and secondary—which are relevant to the partnership. It is then suggested that linkages be considered for potential overlap and intersection between the activities. Finally, the impact that activities have on reputation must be considered including relevance to artistic merit, contribution to community, and organizational effectiveness.

The hope is to move decision-making analysis surrounding complex alternatives from the level of gut instinct, to more a more reasoned and adequately weighed analysis. Naturally, judgement, experience, intuition, and instinct play an dominant role in any decision. However, these elements can arguably play a more profound role with the benefit of some direction, discipline, and structure as is intended with the model. It should be further noted, that this framework deals only with the analysis elements of partnership; issues such as trust, learning, compromise, shared management, etc. are all critical elements which will be reserved for other partnership research. Nevertheless, it is hoped that the PAVC will form an important foundation for improved PAO decision making.

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- Unrau, K.P. (2002). Confidential and unpublished interview performed under the supervision of S. Preece.

Exhibit A.

PERFORMING ARTS VALUE CHAIN

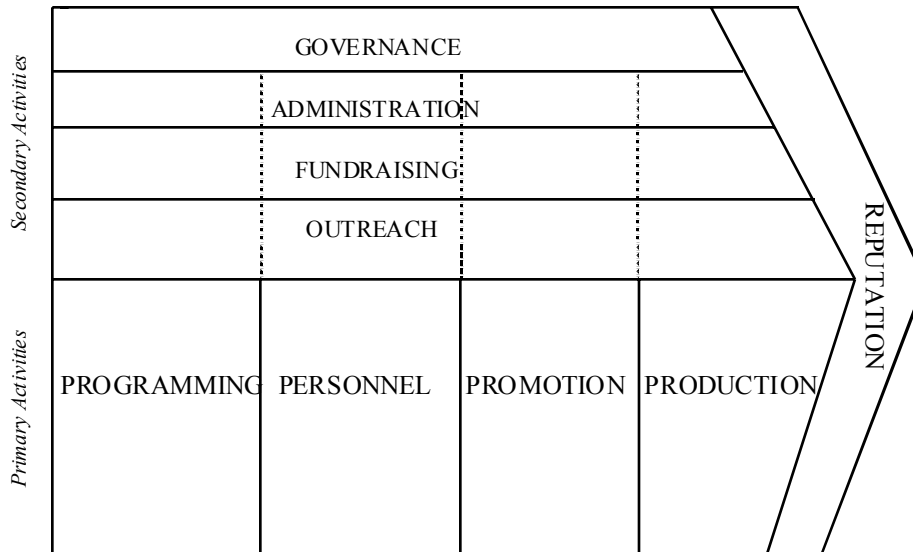


Exhibit B.

PERFORMING ARTS REPUTATION

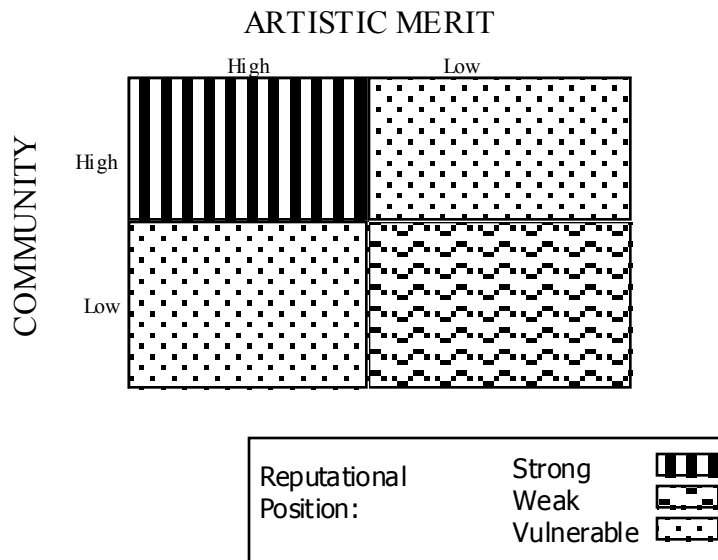


Exhibit C.

BO & NHM Partnership Performing Arts Value Chain Analysis

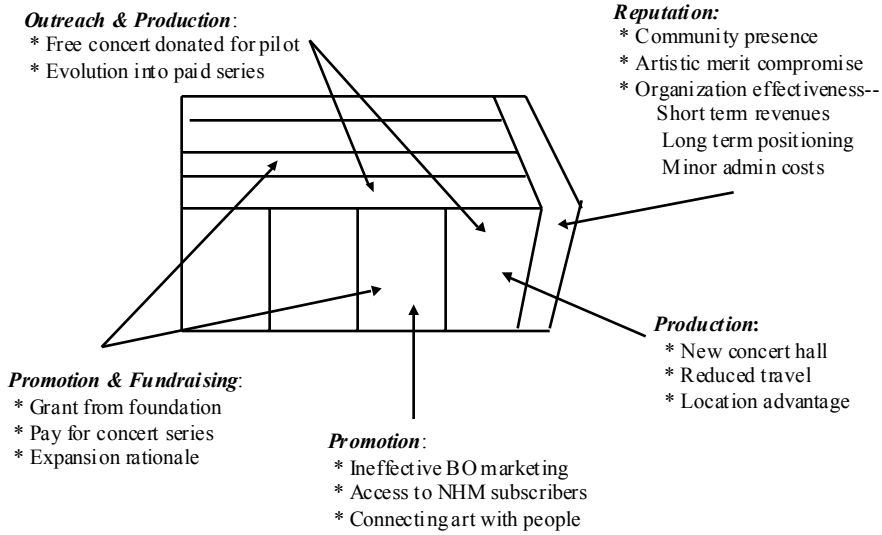
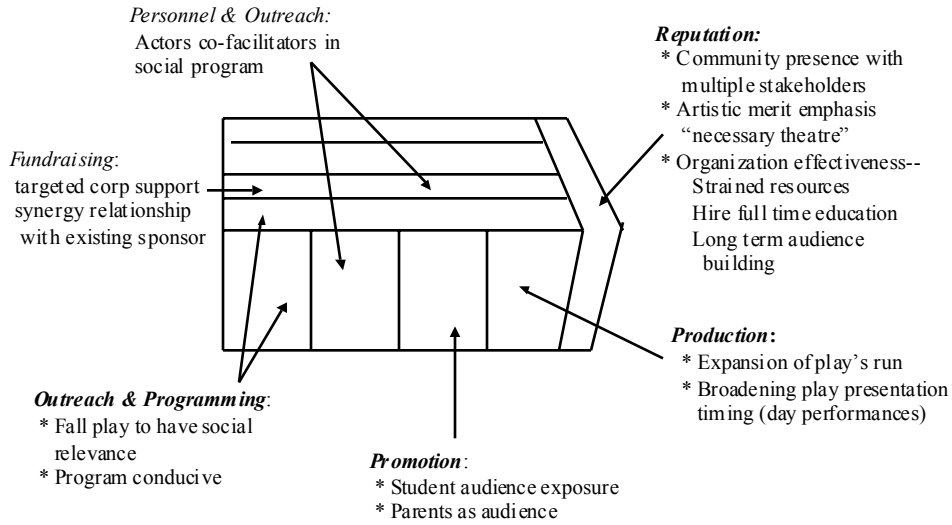


Exhibit D.

Theatre-Social Service-Corporate-School Partnership Performing Arts Value Chain Analysis



Canadian/British Theatre Partnership Performing Arts Value Chain Analysis

