Study of the Business Habits and Practices of Regional Ballet Companies in the US and Canada

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NOTE FROM THE AUTHOR, MAY 2020

I completed my research in February 2020. At the time of drafting of this paper, I intended the research to be a useful tool for a ballet company's internal planning. Since then, the world has upended itself as a result of COVID-19, and sustainability is a live issue for all performing arts organizations. In addition to my research being a helpful tool to inform business decisions of regional ballet companies, I now wonder if it will serve as a benchmark at the moment just before the entire world hit pause, and what telling insights the comparative data of the next few years will reveal about the sustainability of my beloved art form.

1. FOREWORD

Ballet is an art form that is practiced all over the world. The sustainability of this performing art ultimately lives with the purveyors and practitioners, lest it become a museum piece or mere preservation project in select urban centers, rather than the vibrant regional art form that I believe it to be. How do we sustain it? As regional ballet companies in the US close their doors[i], this becomes not a mere academic existential question, but one that has real life implications for dancers, audiences, and communities across the country.

The ability of regional ballet companies to survive and their future success is, in part, dependent on a sustainable business model. Based on recent headlines[ii], some regional ballet companies are struggling, some even folding, while others prosper. Why, and what can we learn from them? For those ballet companies that struggle, they risk exploiting their artists, persevering literally on the backs of their dancers. For those companies that seem to be thriving, how close are they to burning out their leadership and ultimately closing their doors?

Financial freedom is artistic freedom. What does that, could that, and should that look like for the regional ballet company in the US and Canada today? This paper attempts to study some of the business habits and practices of this beloved art form. What are the appropriate ratios of earned and contributed income? What percentage of expense should be dedicated to salaries? What is the average tenure of an artistic director? What is the average number of dancers and programs? How does fundraising compare by region? The first step is to identify best practices before companies can attempt to replicate them.

Important questions of responding to changing demographics and authentic community engagement are beyond the scope of this paper, however it is important to acknowledge that they are linked to sustainability. If whole sections of a community do not find ballet to be relevant to them today, it will be even less so in ten, twenty, fifty years from now. Investment in community engagement work is related to the future sustainability of the art form.

I arrived at this research project from a belief that ballet executives every day are faced with tough decisions about how to invest limited critical resources. Artistic and executive directors face significant operating pressures, such as ongoing demands to make payroll, meeting rising production costs, and managing cash flow, which leaves little time for meaningful reflection on the business habits and practices of one's own company, let alone time to look across the field to see what one's peers are doing. My hope is that shared learning from this paper will serve the field, helping to inform and guide business decisions that will serve ballet companies and ultimately the art form itself.

2. INTRODUCTION

This paper aims to:

1. **Compile and analyze** data related to business habits and practices of regional ballet companies, so as to provide
2. **Insights** into factors of success and sustainability, that can
3. **Inform** the business decisions of regional ballet companies.

This paper proposes to assess "who's doing what," compiling data points around such factors as revenue sources, expense categories, artistic programming, training programs, unionization, and region. Through analysis of the data, this paper attempts to offer insights into the best practices of successful companies in an effort to understand what is working for them. Ballet is an art form, meaning success is more than balancing the bottom line. For the purposes of this project, **a successful company is defined as financially sound and stable, whose work is good and relevant**.

My hope is the interpretation of this data will be a shared conversation, widely discussed by ballet executives and arts leaders, helping to inform future business decisions. In addition to providing value to ballet executives and arts leaders, this large benchmarking data hopefully will provide value to dance service organizations, arts funders and supporters.

3. METHOD

The research for this paper focused heavily on financial reporting, and included a review of 3-5 years of Form 990 tax returns or financial statements for 33 ballet companies[iii]. Additional sources of information included aggregate information compiled by Dance USA and SMU Data Arts, research and published findings from Dance Data Project ®, online research, published articles from Dance Magazine and other trade publications, and self-reporting from the websites of the ballet companies themselves.

Excluded from this study are the largest ballet companies by budget size (over $12M), or ballet companies with international or national reach, and therefore not considered regional ballet companies. For the purposes of this paper, the working definition of "regional company" is taken from Dance Magazine:

> *"…small to medium sized companies based in cities outside dance meccas –New York City, Chicago, Los Angeles...[iv]"*

Factors studied include budget size, number of dancers, revenue and expense, union vs. non-union, and region, among others. Consulted were former and current ballet and arts executives, industry peers at Dance USA and NYU Center for Ballet and the Arts, fellow researchers like Dance Data Project ®, as well as dancers and dance critics.

This paper adopted a mixed method approach of identifying six companies for in depth case study, followed by examination of a large pool of 27 regional ballet companies, for a total of 33 companies in the US and Canada.

Case studies:

- 6 companies were selected to be the subject of in depth study to identify common characteristics or factors shared among those companies.
- Companies selected for case study were those with a reputation for being a successful company.
- Reputation for success was determined by a) peer literature review, such as news articles and coverage in industry publications like Dance Magazine[v], b) prestigious awards and grant funding[vi], such as the National Endowment for the Arts and the Canada Council for the Arts, and c) dancer informed perspective from a career dancer with a 20 year professional performing career in both Canada and the United States.
- Companies selected for case study were of similar budget sizes, ranging from $7M to $12M, and represented different geographic regions throughout the US and Canada.

Companies selected for case study were:

1. Atlanta Ballet (South Atlantic region)
2. Ballet West (West region)
3. Colorado Ballet (West region)
4. Pennsylvania Ballet (Northeast region)
5. Royal Winnipeg Ballet (Canada, Manitoba region)
6. Les Grands Ballets Canadiens (Canada, Quebec region)

Ballet Company Comparisons:

- After common characteristics from the six case studies were identified in section 4, this paper examined a pool of 27 ballet companies to determine whether the common characteristics were idiosyncrasies of those six case studies or factors commonly found. Further study offered insights into whether these might be factors of success and sustainability.

4. CASE STUDIES: COMMON CHARACTERISTICS OF SIX SUCCESSFUL COMPANIES

As described in the preceding section, six regional ballet companies were selected for in depth study. The purpose of the close examination was to identify characteristics, if any, that were common among all six companies. Characteristics were examined under these six categories:

1. Organizational History
2. Governance and Leadership
3. Artists
4. Programming
5. Ballet School
6. Financials

A summary of those characteristics for each of the six companies studied are in Table 1 below. The key findings from the case studies were:

Case Studies Key Finding #1: Contributed to Earned Income Ratio

Successful companies have a healthy balance of contributed to earned income (range 40/60 or 60/40) suggesting a healthy mix of both "buyers" (i.e. ticket buying audience and tuition paying students) and "believers" (i.e. donors), without being overly dependent on one over the other.

Case Studies Key Finding #2: 50% on Salaries

- Spending 50% of the company's total budget on salaries, combined administrative and artistic, is standard (all 4 of the US case studies).

Case Studies Key Finding #3: 10 to 20 Year Artistic Director Tenure

- Artistic Directorship of a decade or more is the norm.

Case Studies Key Finding #4: Ballet Schools

- Almost all companies have ballet schools (all 6 of the case studies, and 30 of the 33 companies studied; the three without schools being Sarasota Ballet of Florida, Oregon Ballet Theatre, and Smuin Ballet).

Case Studies Key Finding #5: Unionized

- The majority of companies are unionized (all 6 of the case studies, and 18 of the total 33 companies studied).

Case Studies Key Finding #6: Second Company

- The majority of US companies have a second company (all 4 of the US cases studies, and 17 of the total 31 US companies studied).

Other data points of interest:

1. Average operating expense;
2. Average surplus/deficit;
3. Contributed income and fundraising expense;
4. ROI for fundraising and contributed income by region;
5. Executive Salaries as a % of Salary Expense (see appendix);
6. Number of programs and the number of dancers (see appendix);
7. Rates of revenue increase (see appendix);
8. Risk Attitude Compared to Number of New Works (see appendix).

Table 1: Characteristics of Six Successful Companies

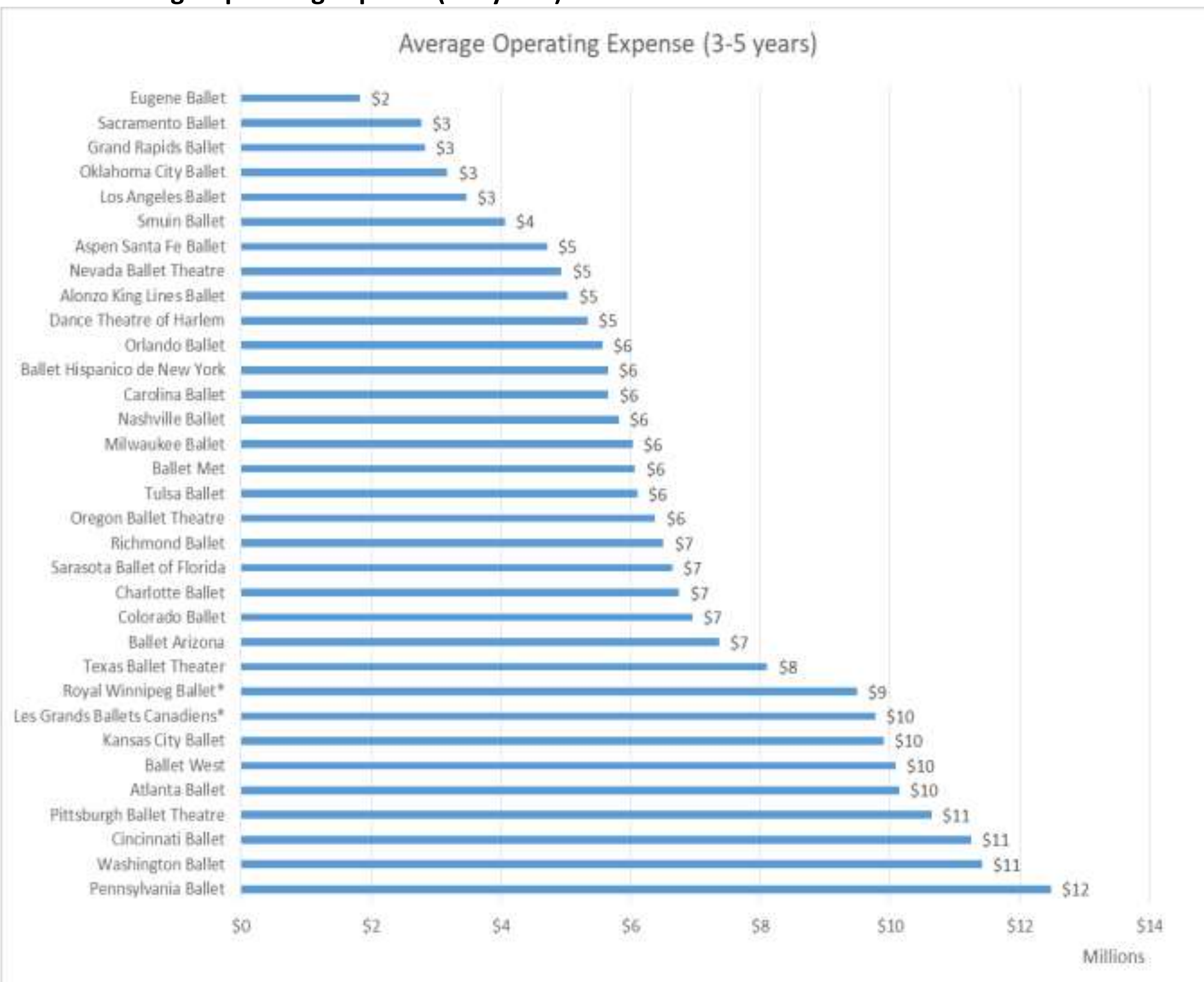
Categories	Companies	Characteristics
1. Organizational History	Commonalities	all in existence 50+ years
	Atlanta Ballet	Founded 1929; 91 years old
	Ballet West	Founded 1963; 57 years old
	Coloroado Ballet	Founded 1961; 59 years old
	Pennsylvania Ballet	Founded 1963; 57 years old
	Royal Winnipeg Ballet	Founded 1939; 81 years old
	Les Grands Ballets Canadiens	Founded 1957; 63 years old
	Other Considerations	while three of the companies own their own building, they only did so recently
2. Governance and Leadership	Commonalities	long established Artistic Directors with average tenure of 15 years; range 3-6 Artistic Directors throughout their history
	Atlanta Ballet	new AD started in 2016; last AD served 22 years
	Ballet West	AD started in 2007, 13 years in tenure
	Coloroado Ballet	AD started in 2006, 14 years in tenure
	Pennsylvania Ballet	new AD started in 2014; last AD served 19 years
	Royal Winnipeg Ballet	AD started in 1996, 24 years in tenure
	Les Grands Ballets Canadiens	new AD started in 2017; last AD served 18 years
	Other Considerations	varied leadership AD as CEO/ED as CEO/co-leadership; ED's turnover with new AD; board size varies, ranges 21-36, with RWB outlier at 12
3. Artists	Commonalities	average 36 dancers incl. apprentices (range 25-40); all companies unionized (AGMA and Canadian Actors' Equity Association); all US companies have Company II; 5 of 6 have orchestras
	Atlanta Ballet	32 dancers, 6 apprentices; AGMA; Atlanta Ballet 2; Orchestra
	Ballet West	40 dancers; AGMA; Ballet West II, 10 dancers; Orchestra
	Coloroado Ballet	27 dancers, 6 apprentices; AGMA; Colorado Ballet Studio Company, 21 dancers; Orchestra
	Pennsylvania Ballet	39 dancers, 6 apprentices; AGMA; Pennsylvania Ballet II, 12 dancers; Orchestra
	Royal Winnipeg Ballet	21 dancers, 4 apprentices; Canadian Actors' Equity Association; Aspirants, 18 trainees
	Les Grands Ballets Canadiens	38 dancers; Canadian Actors' Equity Association; Orchestra
4. Programming	Commonalities	Season is 3-5 programs plus Nutcracker; all have second stage/multi-venue; range 2200-4600 large venue seating capacity
	Atlanta Ballet	4 programs ; plus Nutcracker; plus new venue premiere; plus Atlanta Ballet 2; (7 total)
	Ballet West	3 programs; plus Nutcracker; plus Choreographic Festival; plus Ballet West II; (6 total)
	Coloroado Ballet	3 programs; plus Nutcracker; (4 total)
	Pennsylvania Ballet	5 programs; plus Nutcracker; (6 total)
	Royal Winnipeg Ballet	3 programs; plus Nutcracker; plus concert; plus Aspirants; (6 total); plus touring
	Les Grands Ballets Canadiens	4 programs; plus Nutcracker; (6 total)
	Other Considerations	Royal Winnipeg Ballet only company with consistent touring, which is specifically funded with government support
5. Ballet School	Commonalities	all have schools; 4 have been in existence 50+ years
	Atlanta Ballet	school founded 1996; 24 years old
	Ballet West	school founded 1963; 57 years old
	Coloroado Ballet	school founded 1951; 69 years old
	Pennsylvania Ballet	school re-established 2012; 8 years old
	Royal Winnipeg Ballet	school founded 1962; 58 years old; boarding school
	Les Grands Ballets Canadiens	school founded 1966; 54 years old
6. Financials	Commonalities	on average, 5 out of 6 companies ending the year in the black; all have healthy balance of contributed and earned income; 40/60 or 60/40; all US companies spent at least 50% of budget on salaries (range 50-54%
	Atlanta Ballet	average budget $10M; contributed and earned 41/56; 52% of budget on salaries; no deficit last 3 years
	Ballet West	average budget $10M; contributed and earned 50/46; 54% of budget on salaries; no deficit last 5 years
	Coloroado Ballet	average budget $7M; contributed and earned 39/60; 50% of budget on salaries; no deficit last 5 years
	Pennsylvania Ballet	average budget $12M; contributed and earned 58/40; 51% of budget on salaries; no deficit 2 of last 4 years
	Royal Winnipeg Ballet	average budget CDN$13M; contributed and earned 38/48; 43% of budget on salaries; deficit 4 of last 5 years
	Les Grands Ballets Canadiens	average budget CDN$13M; contributed and earned 43/47; 33% of budget on salaries; no deficit last 2 years (only 2 years fin. Info avail)

5. COMPARISONS OF 27 BALLET COMPANIES TO THE FINDINGS FROM SIX CASE STUDIES

After common characteristics from the six case studies were identified in section 4, this paper examined a pool of 27 ballet companies to determine whether the common characteristics were idiosyncrasies of those six case studies or factors commonly found. Further study offered insights into whether these might be factors of success and sustainability.

The budget range of all companies studied is $2M-$12M.

Chart 1: Average Operating Expense (3-5 years)



*CDN$ converted to US$

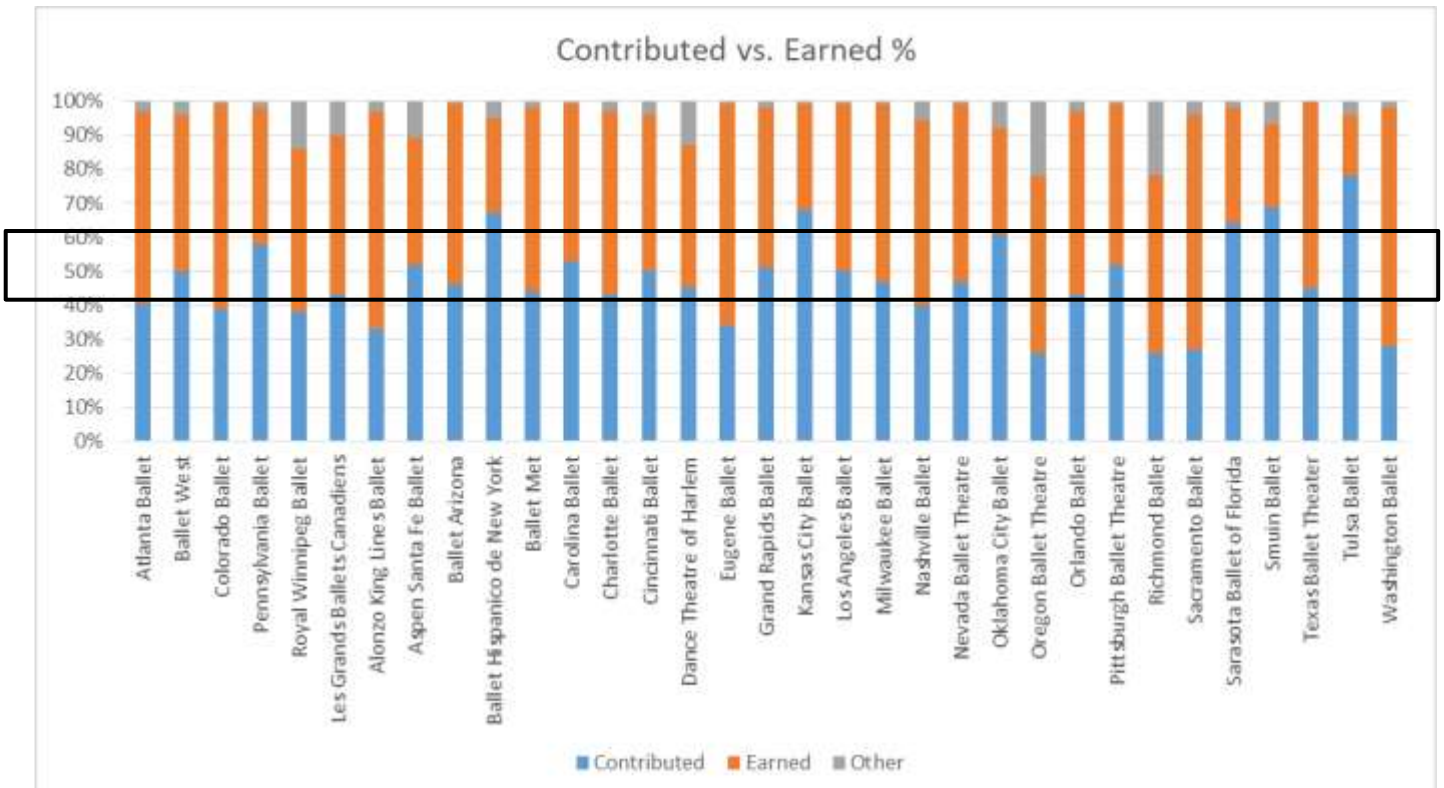
Case Studies Key Finding #1:

- Successful companies have a healthy balance of contributed to earned income (range 40/60 or 60/40) suggesting a healthy mix of both "buyers" (i.e. ticket buying audience and tuition paying students) and "believers" (i.e. donors), without being overly dependent on one over the other.

Further Study Recommended:

- An examination of sources of earned income (i.e. % tickets sales vs. % school tuition, etc), and an attempt to map those sources to expense items, to see if there is a correlation;
- An examination of how earned income relates to advertising and promotional expense.

Chart 2: Contributed vs Earned %



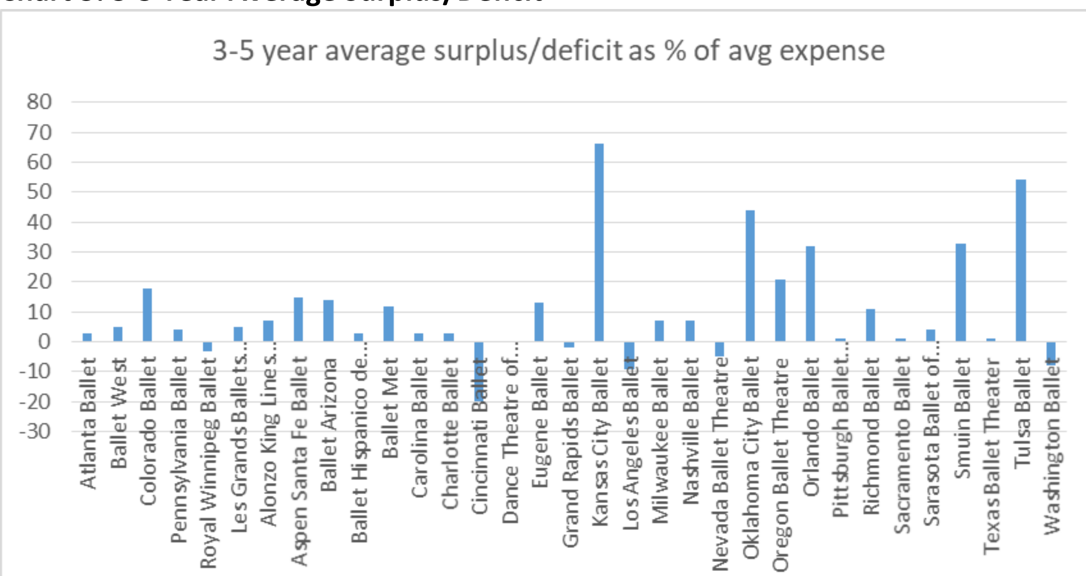
Companies within 40/60 or 60/40 range:

1. Ballet Arizona
2. Ballet Met
3. Carolina Ballet
4. Charlotte Ballet
5. Cincinnati Ballet
6. Dance Theatre of Harlem
7. Grand Rapids Ballet
8. Los Angeles Ballet
9. Milwaukee Ballet
10. Nashville Ballet
11. Nevada Ballet Theatre
12. Orlando Ballet
13. Pittsburgh Ballet Theatre
14. Texas Ballet Theater

Companies not in 40/60 or 60/40 range:

1. Alonzo King Lines Ballet
2. Aspen Santa Fe Ballet
3. Ballet Hispanico of New York
4. Eugene Ballet
5. Kansas City Ballet ($26M other contribution in FY17)
6. Oklahoma City Ballet
7. Oregon Ballet Theatre
8. Richmond Ballet
9. Sacramento Ballet
10. Sarasota Ballet of Florida
11. Smuin Ballet
12. Tulsa Ballet
13. Washington Ballet

Chart 3: 3-5 Year Average Surplus/Deficit



- From case studies, 5 of 6 ended their last reported fiscal year in the black and averaged a surplus over the last 3 to 5 years.
- Comparing 3-5 year averages of surplus or deficits across other companies suggest this is the norm, and not a particular factor for those companies in the case study.
- While this may not be a significant factor in indicating success, it would be interesting to study companies that have failed to see if a trend of deficits was a factor in their demise.
- Kansas City Ballet, Oklahoma City Ballet, Orlando Ballet, Smuin Ballet and Tulsa Ballet posted average surpluses greater than 25%, suggesting an extraordinary event in the last 3-5 years.

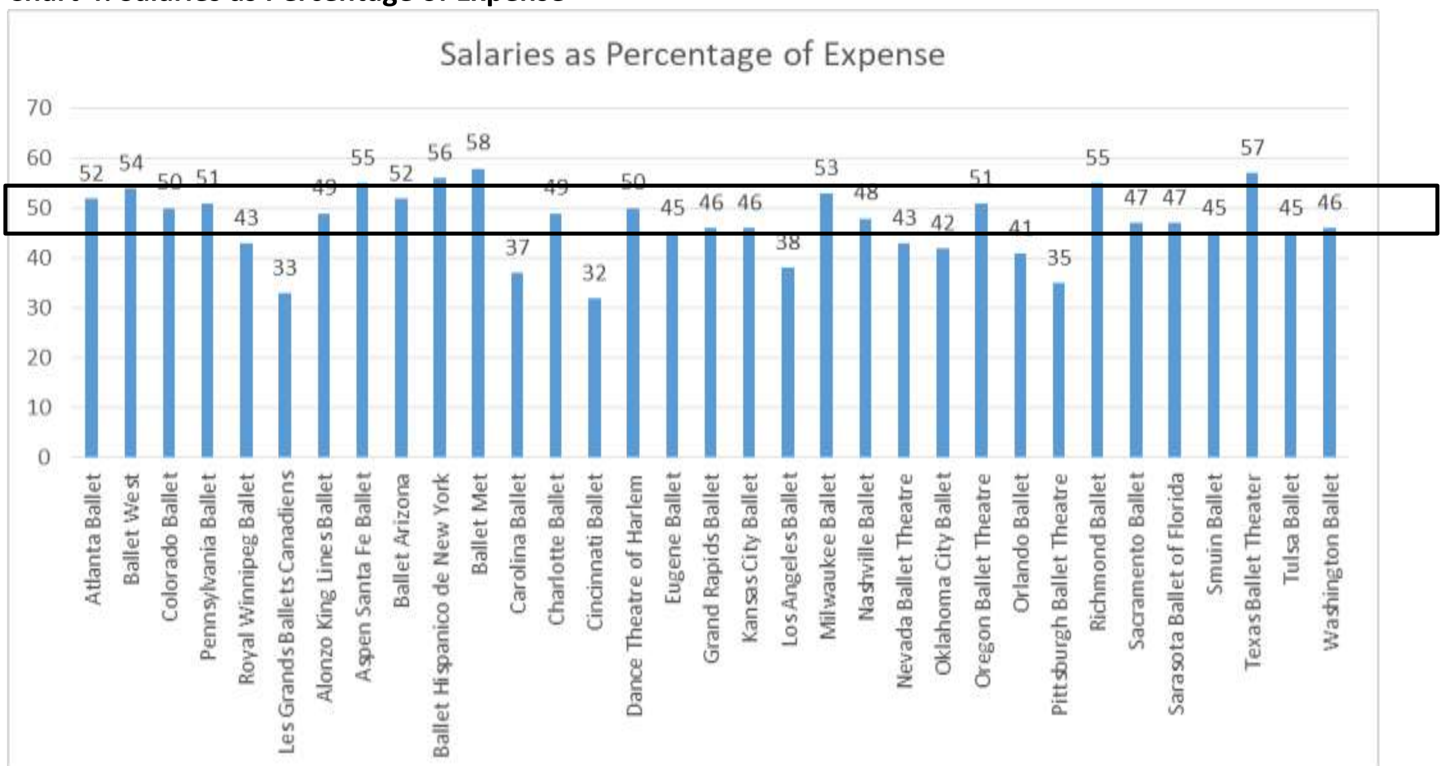
Case Studies Key Finding #2:

- Spending 50% of the company's total budget on salaries, combined administrative and artistic, is standard (all 4 of the US case studies).

Further Study Recommended:

- An examination of dancers' salaries and how that relates to number of dancers, number of programs, and overall salary expense for organization.

Chart 4: Salaries as Percentage of Expense



- The 4 US companies in the case studies spent at least 50% of budget on salaries (range 50-55%). Only three US companies spent more than that, Ballet Hispanico of New York (56%), Ballet Met (58%) and Texas Ballet Theater (57%)
- Of all the US companies compared, only 6 are more than 5% under that range, Carolina Ballet (37%), Cincinnati Ballet (32%), Los Angeles Ballet (38%), Nevada Ballet Theatre (43%), Oklahoma City Ballet (42%), Orlando Ballet (41%), and Pittsburgh Ballet Theatre (35%).
- This may suggest the norm rather than a factor of success.

Case Studies Key Finding #3:

- Artistic Directorship of a decade or more is the norm.

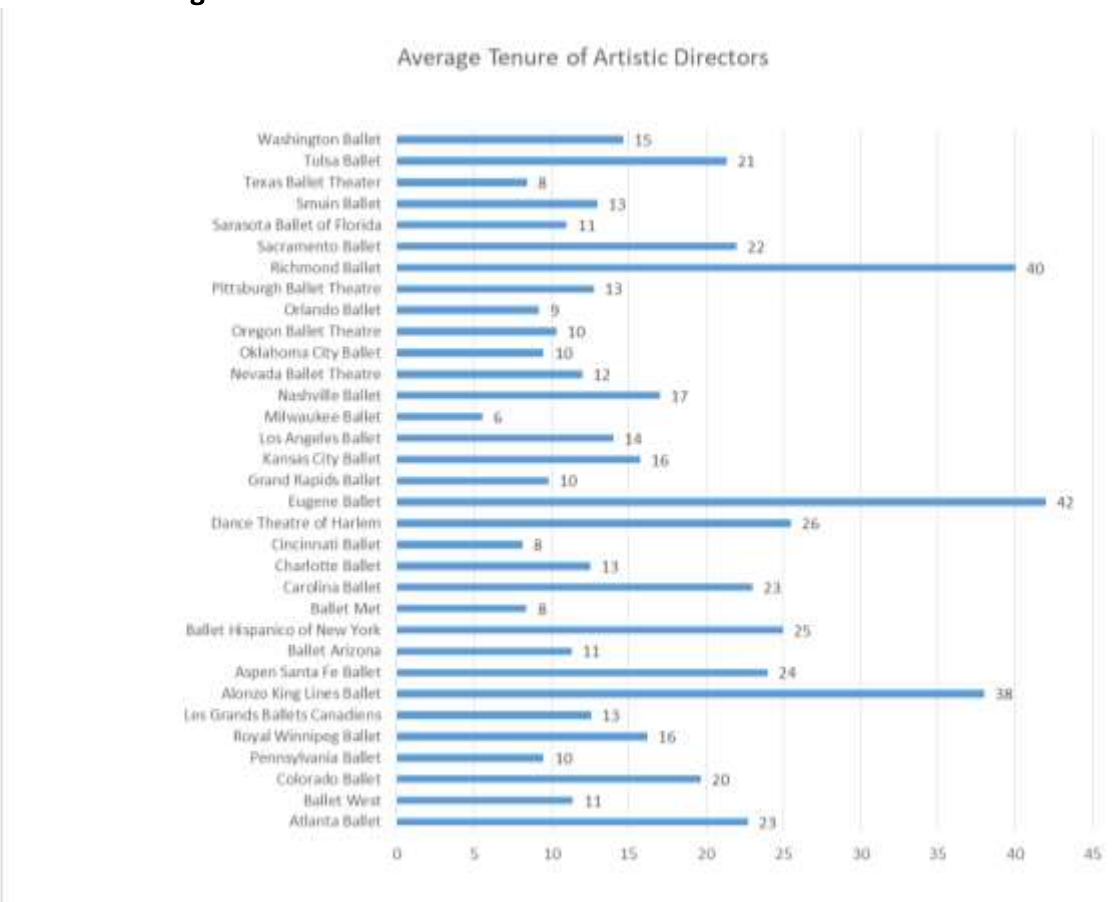
For Consideration:

- Long range planning should factor a tenure of 10 to 20 years for Artistic Directors.

Further Study Recommended:

- Shared or common lineage among artistic directors.
- What would be gained or lost by more frequent leadership changes?

Chart 5: Average Tenure of Artistic Directors



- For the 6 companies of the case studies, they had 3-6 Artistic Directors over the course of their history, with an average tenure of 17 years (range of tenure 9-23 years).
- Among companies compared, 5 still have founding Artistic Directors, Alonzo King Lines Ballet, Eugene Ballet, Richmond Ballet, Aspen Santa Fe Ballet and Los Angeles Ballet (the youngest company). Carolina Ballet's founding Artistic Director recently stepped down in 2019, and the company has a new Artistic Director for the first time in 23 years.
- Among companies compared, the range of Artistic Directors was 1-9 over the course of their history with an average tenure of 19 years (range 5-41 years).
- Among companies compared, only 1 had more than 5 Artistic Directors, Milwaukee Ballet with 9 over its history.

Case Studies Key Finding #4:

- Almost all companies have ballet schools (all 6 of the case studies, and 30 of the 33 companies studied; the three without schools being Sarasota Ballet of Florida, Oregon Ballet Theatre, and Smuin Ballet).

Further Study Recommended:

- The role of a ballet school as a business stabilizer, and its role in serving the company and community.

Chart 6: Age of Company & School

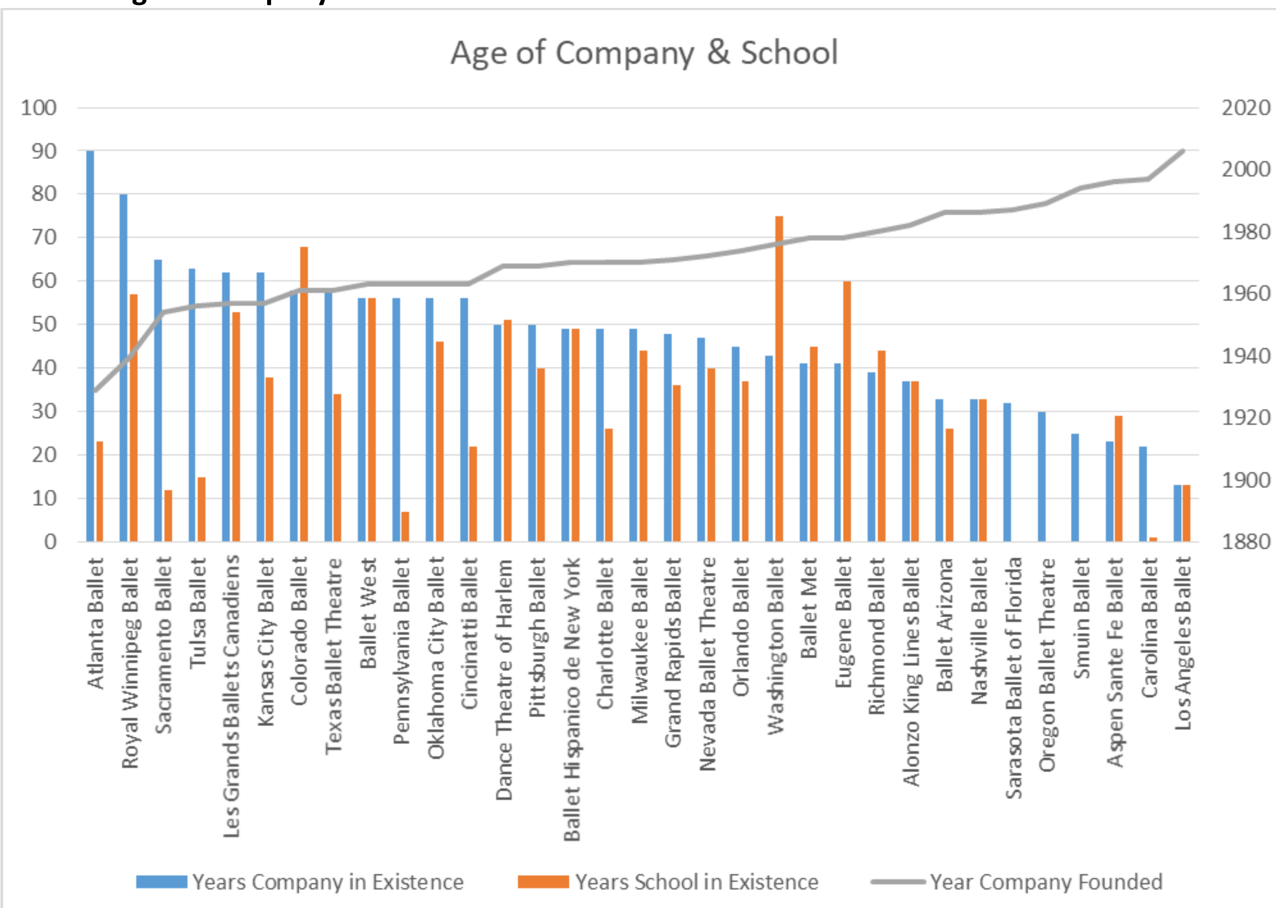
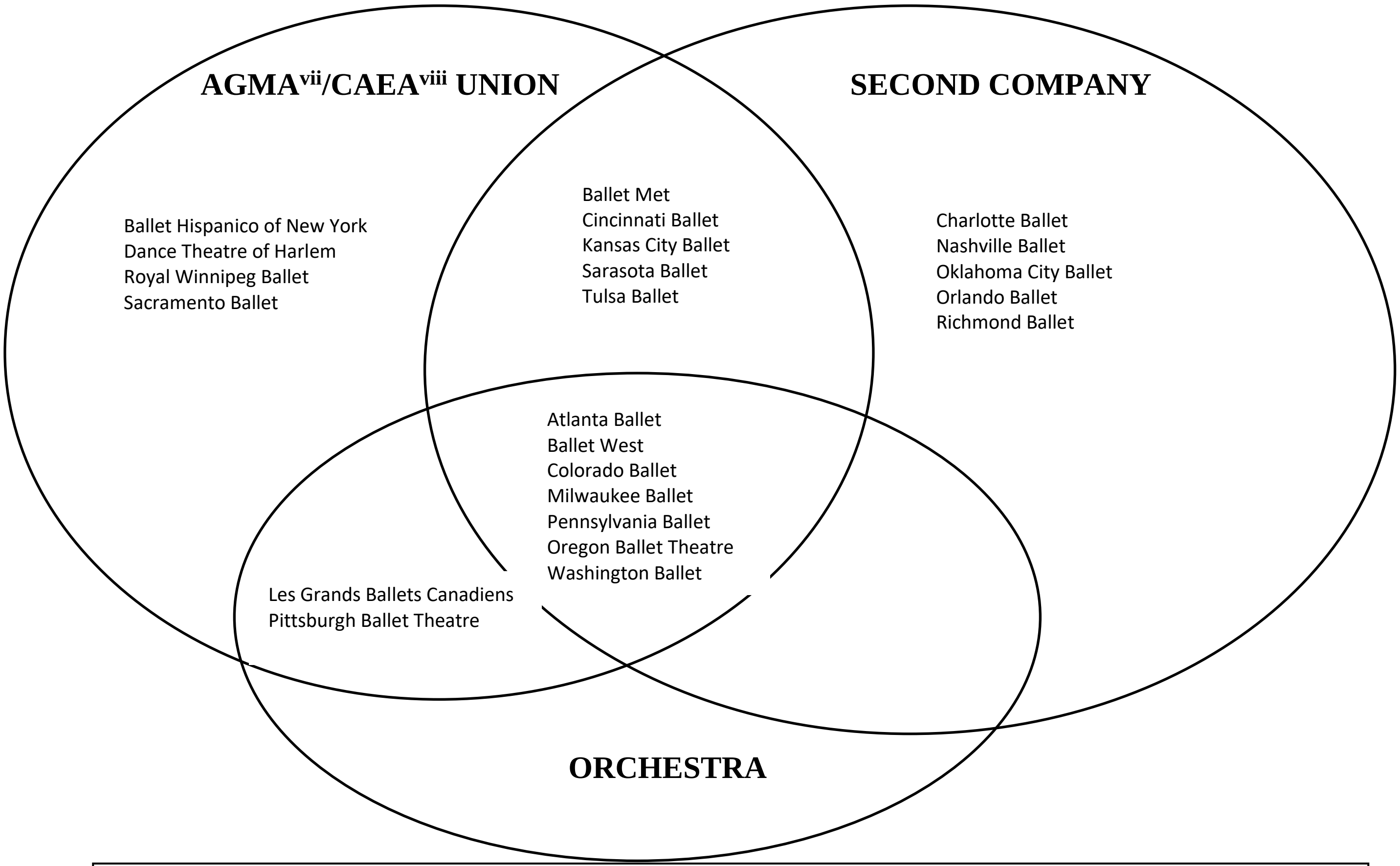


Diagram 1: Companies that are unionized, have second companies and/or orchestras



Case Studies Key Finding #5:

- The majority of companies are unionized (all 6 of the case studies, and 18 of the total 33 companies studied).

Key Finding #6:

- The majority of US companies have a second company (all 4 of the US cases studies, and 17 of the total 31 US companies studied).

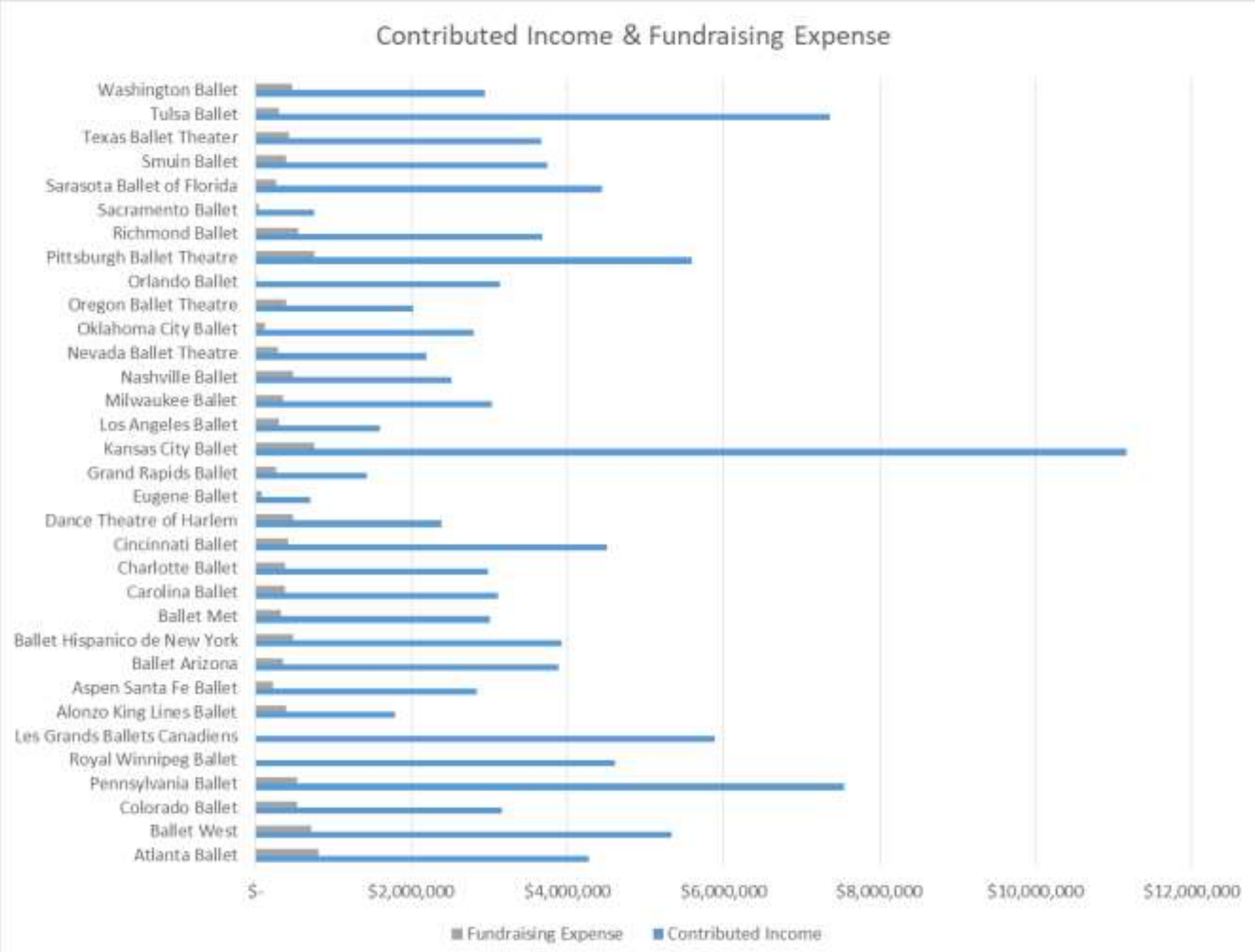
Further Study Recommended:

- The role a second company plays in the company's success.

The following companies have neither orchestras, second companies, nor unions:

1. Alonzo King Lines Ballet
2. Aspen Santa Fe Ballet
3. Ballet Arizona
4. Carolina Ballet
5. Eugene Ballet
6. Grand Rapids Ballet
7. Los Angeles Ballet
8. Nevada Ballet Theatre
9. Smuin Ballet
10. Texas Ballet Theatre

Chart 7: Contributed Income & Fundraising Expense



Contributed Income:

Of those regional ballet companies studied, the top 3 raising the most contributed income are:

1. Kansas City Ballet $11.1M (Midwest region)
2. Pennsylvania Ballet $7.5M (Northeast region)
3. Tulsa Ballet $7.3M (South Central region)

Each top performer represented a different region.

Of those regional ballet companies studied, the bottom 5 for raising the least contributed income are:

1. Alonzo King Lines Ballet $1,7M (Pacific region)
2. Los Angeles Ballet $1,5M (Pacific region)
3. Grand Rapids Ballet $1,4M (Midwest region)
4. Sacramento Ballet $761K (Pacific region)
5. Eugene Ballet $704K (Pacific region)

4 of the 5 are in the Pacific region. Does this suggest that some regions, like the Pacific region, are harder to raise money in? While Los Angeles Ballet is a new company, having been founded in 2006, the other 4 companies have been in existence since at least 1982.

Fundraising Expense:

In regards to fundraising expense, the 3 companies that spend the most on fundraising are:

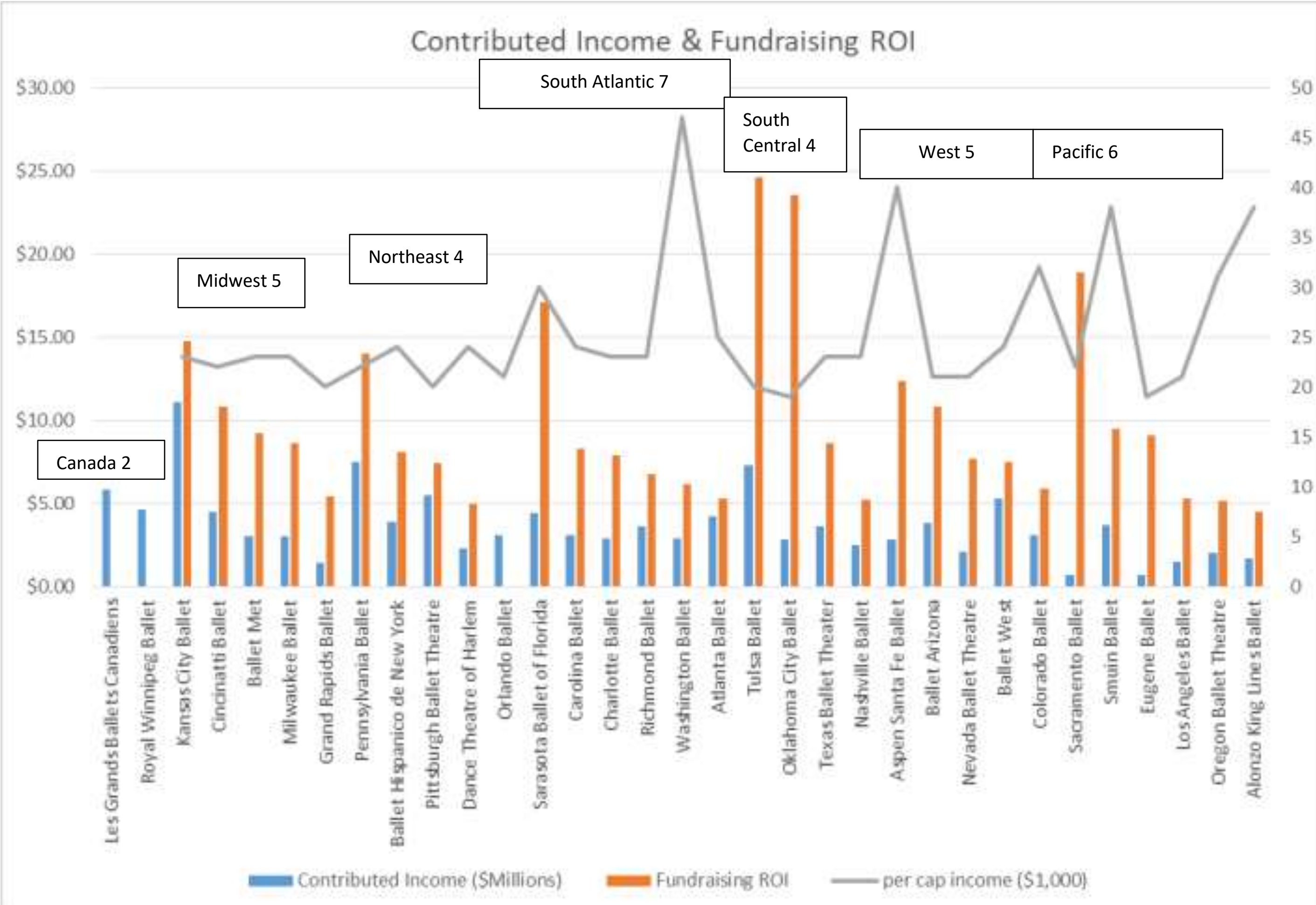
1. Atlanta Ballet spending $800K to raise $4.2M (ranked 10 in average contributed income raised)
2. Pittsburgh Ballet Theatre spending $756K to raise $5.5M (ranked 5 in average contributed income raised)
3. Kansas City Ballet spending $755K to raise $11.1M (ranked 1 in average contributed income raised)

Each of these top spenders is also a top fundraiser among the companies studied, each company ranked among the top 10 companies for average contributed income raised, perhaps demonstrating that to raise more money you have to spend more, wisely[ix]. Similarly, those that spent the least on fundraising, raised the least.

The companies that spent the least on fundraising are:

1. Eugene Ballet spending $77K to raise $700K (ranked 33 and last in average contributed income raised)
2. Sacramento Ballet spending $40K to raise $760K (ranked 32 in average contributed income raised)
3. Orlando Ballet spending $20K to raise $3M (ranked 17 in average contributed income raised)

Chart 8: Contributed Income & Fundraising ROI by Region



ROI:

The calculation for fundraising ROI is contributed income/fundraising expense. For the purposes of this study, in-kind donations are not included in contributed income, and ROI and per cap income for Canadian companies not available. The ranking of best to worst fundraising ROI is[x]:

1. Orlando Ballet $ 155.20 South Atlantic
2. Tulsa Ballet $ 24.63 South Central
3. Oklahoma City Ballet $ 23.53 South Central
4. Sacramento Ballet $ 18.92 Pacific
5. Sarasota Ballet of Florida $ 17.07 South Atlantic
6. Kansas City Ballet $ 14.77 Midwest
7. Pennsylvania Ballet $ 13.99 Northeast
8. Aspen Santa Fe Ballet $ 12.35 West
9. Cincinnati Ballet $ 10.84 Midwest
10. Ballet Arizona $ 10.78 West
11. Smuin Ballet $ 9.49 Pacific

12. Ballet Met	$	9.19	Midwest
13. Eugene Ballet	$	9.10	Pacific
14. Texas Ballet Theater	$	8.59	South Central
15. Milwaukee Ballet	$	8.59	Midwest
16. Carolina Ballet	$	8.27	South Atlantic
17. Ballet Hispanico of New York	$	8.05	Northeast
18. Charlotte Ballet	$	7.87	South Atlantic
19. Nevada Ballet Theatre	$	7.66	West
20. Ballet West	$	7.48	West
21. Pittsburgh Ballet Theatre	$	7.39	Northeast
22. Richmond Ballet	$	6.71	South Atlantic
23. Washington Ballet	$	6.16	South Atlantic
24. Colorado Ballet	$	5.90	West
25. Grand Rapids Ballet	$	5.40	Midwest
26. Los Angeles Ballet	$	5.30	Pacific
27. Atlanta Ballet	$	5.29	South Atlantic
28. Nashville Ballet	$	5.24	South Central
29. Oregon Ballet Theatre	$	5.12	Pacific
30. Dance Theatre of Harlem	$	4.91	Northeast
31. Alonzo King Lines Ballet	$	4.48	Pacific

Comparisons are made by Metropolitan Statistical Area (MSAs)[xi] and region[xii]. There were large ranges in ROI within all regions:

- Midwest ROI range $5.40-$14.77
- Northeast ROI range $4.91-$13.99
- South Atlantic ROI range $5.29-$155
- South Central ROI range $5.24-$24.64
- West ROI range $5.90-$12.35
- Pacific ROI range $4.48-$18.92

The companies with the best ROI for fundraising (contributed income/fundraising expense are:

1. Orlando Ballet $155 (MSA ranked 22) (note Orlando ROI not included in bar graph above because $155 is outlier)
2. **Tulsa Ballet $25 (MSA ranked 55)**
3. Oklahoma City Ballet $24 (MSA ranked 41)
4. Sacramento Ballet $19 (MSA ranked 26)
5. **Sarasota Ballet $17 (MSA ranking 72)**

Of note: Tulsa Ballet and Sarasota Ballet are raising significant contributed income, $7.4M and $4.4M respectively, whereas low expense is the driving factor in Orlando Ballet, Sacramento Ballet and Oklahoma City Ballet's ROI (spending only $20K to raise $3M at Orlando Ballet, spending only $40K to raise $760K at Sacramento Ballet, and spending only $119K to raise $2.8M).

Orlando Ballet and Sacramento Ballet spend the least amount of money of fundraising, and their MSA rankings are 22 and 26. For the other 3, the highest Metropolitan Statistical Area ranking is 41, with MSA populations all under 1.4M. The per capita income[xiii] for Tulsa and Oklahoma City is $20K and $19K, ranking only 118 and 148. In the nation. It would be interesting to discover if a certain sector of giving was particularly generous in these regions (e.g. large corporate gifts from the oil and gas industry over individual gifts). By contrast, the per capita income in Sarasota is $30K, ranking 11th in the nation.

The companies with the worst ROI for fundraising:

1. Alonzo King Lines Ballet $4 (MSA ranked 12)
2. Dance Theatre of Harlem $5 (MSA ranked 1)
3. Oregon Ballet Theatre $5 (MSA ranked 25)

Each of the bottom 3 are in MSAs ranked 25 or higher, in cities with per cap incomes in the top 20 in the country. Perhaps there is greater competition for contributed income in these higher ranked MSAs, resulting in lower fundraising ROIs.

Companies from the Midwest, Northeast, West and Pacific regions are fairly evenly distributed within the ranking. This may suggest that factors unique to each city, such as a wealthy philanthropist or specific industry, rather than general market conditions, may play a more significant factor in fundraising in those regions.

For the South Atlantic region, the two Florida based companies were ranked 1st and 5th for fundraising ROI, whereas the other five South Atlantic companies all ranked below the ROI average. Does this suggest this is a harder region to in which to fundraise?

6. PROCESS REFLECTIONS AND RECOMMENDATIONS

This research project was designed to be a large scale study on the business habits and practices of regional ballet companies in the US and Canada. In this section I draw on my own experiences delivering the project and feedback from advisors to reflect on the process and note what worked well, what was difficult and what could be improved in the future. I make several recommendations to offer prompts to the ballet companies themselves and other researchers involved in collecting such data.

By compiling and analyzing the extensive data of such a large group of regional ballet companies, 33 in total, this study was able to offer comparisons into the business habits and practices of regional ballet companies, attempting to identify dimensions that would generate the most meaningful insights into factors of success and sustainability.

The data analyzed here is by no means a complete account of the various components of a successful business model, nor a replacement set of key performance indicators (KPIs) against which the performance of all regional ballet companies can be judged. Rather, this research is intended to inform, not audit, and allow for critical reflection and improvement rather than create a roadmap. The hope is that this research will serve as an additional tool providing ballet companies with large-scale benchmarking data on themselves and their peers.

As with any research the choice is between depth of exploration and breadth of response. The choice made here was breadth, primarily relying on publicly shared information from Form 990s and websites. Ballet companies wishing to deepen the analysis are invited to provide context and additional financial information for study. The self-reporting provided to SMU Data Arts Cultural Data Profile[xiv] could be an excellent source of such information.

In the future, I am keen to look at an even broader range of data points to further explore which metrics are indicators or factors of success and sustainability, and which are merely standard norms, and see who, if anyone, is challenging those norms with success. I would also like to update the research with new financial information as it gets reported, to see how the data changes year over year, as well as to see how the data changes for those companies with new leadership, considering eight of the companies studied had new artistic directors join since 2016[xv].

A significant challenge for this study was in defining a "successful company." As described in the introduction, **a successful company is defined as financially sound and stable, whose work is good and relevant**. This definition is the author's own, and it begs the question, what is "financially sound and stable," and what is "good and relevant," and going further, is there a correlation, questions that could each form the basis of entirely separate research papers. For the purposes of this project, I avoided defining those terms explicitly, rather relying on a company's reputation for being successful as the selection criteria for the case studies, as described in section 3.

While this study recognizes that ballet is an art form, and success is more than balancing the bottom line, because this study focused on business habits and practices it relied heavily on financial reporting, resulting in greater analysis of the "financially sound and stable" over the "work is good and relevant" part of the definition. A future study on artistic quality could offer such analysis and insight, and I make several suggestions in section 7, Conclusions and Looking Ahead.

This paper's definition of a successful company is only one way of framing success, and sustainability is only one of a number of outcomes that regional ballet companies may consider important. I invite ballet executives to develop their own definition of a successful company, and identify the data points that would be most meaningful and useful to them.

7. CONCLUSIONS AND LOOKING AHEAD

This paper aimed to:

1. **Compile and analyze** data related to business habits and practices of regional ballet companies, so as to provide
2. **Insights** into factors of success and sustainability, that can
3. **Inform** the business decisions of regional ballet companies.

Overall, this research has successfully met these aims. This research is intended to be a useful tool for a ballet company's internal planning, reflection and self-evaluation processes, allowing ballet executives to reflect on what is and isn't working for their own companies, and spark ideas for what could work better. The hope is this paper will lead to discussions among the field around factors of success and sustainability, with ballet companies learning strategies and tactics from each other so as to leverage limited resources, overcome challenges and shore up vulnerabilities. This data and research is of powerful and practical use if it allows regional ballet companies to reflect and refine their business practices through better data-driven decisions, both in their day-to-day decision making and longer term strategic planning.

For further insights into factors of success and sustainability, additional research is required. Possible future areas of study include:

- an examination of sources of earned income (i.e. % tickets sales vs. % school tuition, etc), and an attempt to map those sources to expense items, to see if there is a correlation;
- an examination of how earned income relates to advertising and promotional expense;
- for companies that have failed, whether there was a trend of deficits and how that may have played a factor in their demise;
- an examination of dancers' salaries and how that relates to number of dancers, number of programs, and overall salary expense for organization;
- shared or common lineage among artistic directors;
- what would be gained or lost by more frequent leadership changes?
- the role of a ballet school as a business stabilizer, and its role in serving the company and community;
- the role a second company plays in the company's success;
- whether certain sectors of giving are more generous in certain regions than others, for example large corporate gifts from the oil and gas industry over individual gifts;
- whether there is greater competition for contributed income in higher ranked Metropolitan Statistical Areas, resulting in lower fundraising ROIs;
- whether it is simply harder to raise money in certain regions, like the South Atlantic or Pacific region;
- the role of philanthropy as the risk capital for new works.

Holding with my definition of a successful company as one "whose work is good and relevant," a study on the quality of artistic work could offer tremendous insights. This may be especially true for regional ballet companies as the majority of regional cities have little to no arts journalism[xvi]. One recommendation is to adopt a measurement framework like Culture Counts[xvii], first developed in Australia and piloted[xviii] and adopted by Arts Council England[xix], that uses the following 12 dimension statements to measure:

1. Concept: it was an interesting idea
2. Presentation: it was well produced and presented
3. Distinctiveness: it was different from things I've experienced before
4. Challenge: it was thought-provoking
5. Captivation: it was absorbing and held my attention

6. Enthusiasm: I would come to something like this again
7. Local impact: it is important that it's happening here
8. Relevance: it has something to say about the world in which we live
9. Rigor: it was well thought through and put together
10. Originality: it was ground-breaking
11. Risk: the artists really challenged themselves
12. Excellence: it is one of the best examples of its type that I have seen

Perhaps a pilot study could be launched in a certain region. Such a study could be specific to ballet, for example in my home state of North Carolina, with Carolina Ballet in Raleigh and Charlotte Ballet, or in Oklahoma, where Tulsa Ballet and Oklahoma City Ballet reside. Or a study on artistic quality could include a variety of performing arts disciplines, for example Raleigh is home to Carolina Ballet, North Carolina Symphony, North Carolina Theatre and North Carolina Opera, to name a few performing arts companies.

This large scale study on regional ballet companies has received a positive and encouraging response from the field, suggesting a growing interest from ballet companies, funders, arts leaders, and dance service organizations for further examination and research on sustainable business models for regional ballet companies. I hope that findings from this paper may also serve other performing arts disciplines grappling with similar questions of sustainability. I am excited about the possibility of involving more ballet practitioners and supporters in further research to help advance this beloved art form.

8. ACKNOWLEDGMENTS

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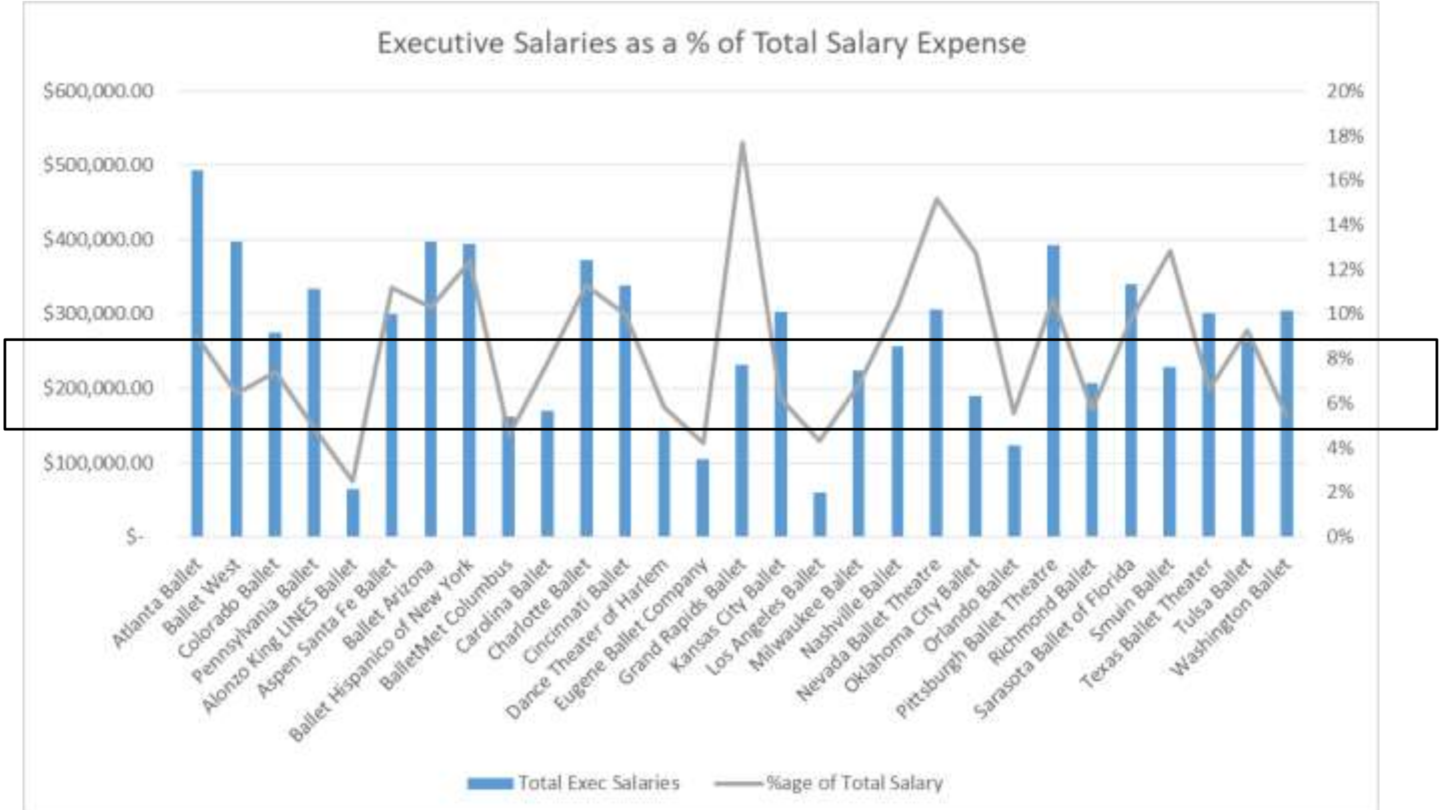
9. APPENDIX

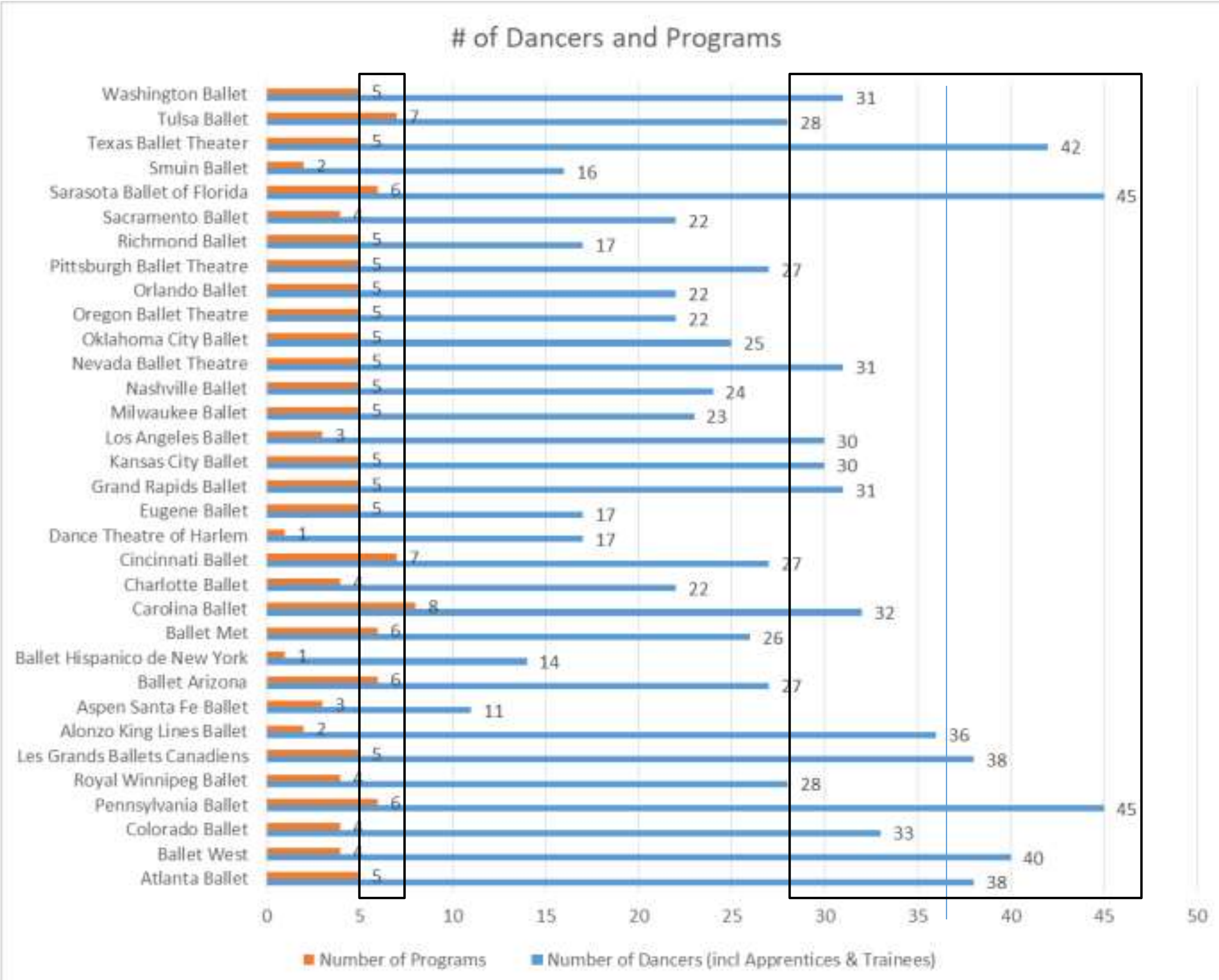
Compiled in the appendix are other data points that may be of interest to readers.

Chart 9: Executive Salaries as a % of Salary Expense



- For the 4 US companies in the case studies, executive salaries represented 5%-9% of the total salary expense.
- 12 companies spend more than 9% of total salaries on executive salaries:
    1. Aspen Santa Fe Ballet
    2. Ballet Arizona
    3. Ballet Hispanico of New York
    4. Charlotte Ballet
    5. Cincinnati Ballet
    6. Grand Rapids Ballet
    7. Nashville Ballet
    8. Nevada Ballet Theatre
    9. Oklahoma City Ballet
    10. Pittsburgh Ballet Theatre
    11. Sarasota Ballet of Florida
    12. Smuin Ballet
- 3 companies spend less than 5% of total salaries on executive salaries:
    1. Alonzo King LINES Ballet
    2. Eugene Ballet Company
    3. Los Angeles Ballet
- 10 companies spend between 5-9% of total salaries on executive salaries:
    1. BalletMet Columbus
    2. Carolina Ballet
    3. Dance Theater of Harlem
    4. Kansas City Ballet
    5. Milwaukee Ballet
    6. Orlando Ballet
    7. Richmond Ballet
    8. Texas Ballet Theater
    9. Tulsa Ballet
    10. Washington Ballet

Chart 10: # of Dancers and Programs



- The 6 companies of the case study had seasons of 4-6 programs (including Nutcracker) and an average 36 dancers incl. apprentices (range 28-45)
- Dance Theatre of Harlem, Alonzo King Lines Ballet, Smuin Ballet, and Ballet Hispanico of New York have one or two home seasons and extensive touring, Los Angeles Ballet tours throughout the region, and Aspen Santa Fe Ballet calls two cities home. Other than those 6, only 3 companies, Carolina Ballet, Cincinnati Ballet and Tulsa Ballet, had programming outside the range, with 7-8 programs, the latter two both having Second Companies.
- Only 10 companies compared had dancers within that range: Alonzo King Lines Ballet (36); Carolina Ballet (32), Grand Rapids Ballet (31), Kansas City Ballet (30), Los Angeles Ballet (30), Nevada Ballet Theatre (31), Sarasota Ballet (45), Texas Ballet Theater (42), Tulsa Ballet (28) and Washington Ballet (31); the remaining 17 companies had less than 28 dancers.

Table 2: Rates of Revenue Increase Compared to Rates of Expenses Increase, suggestive of Risk Attitudes

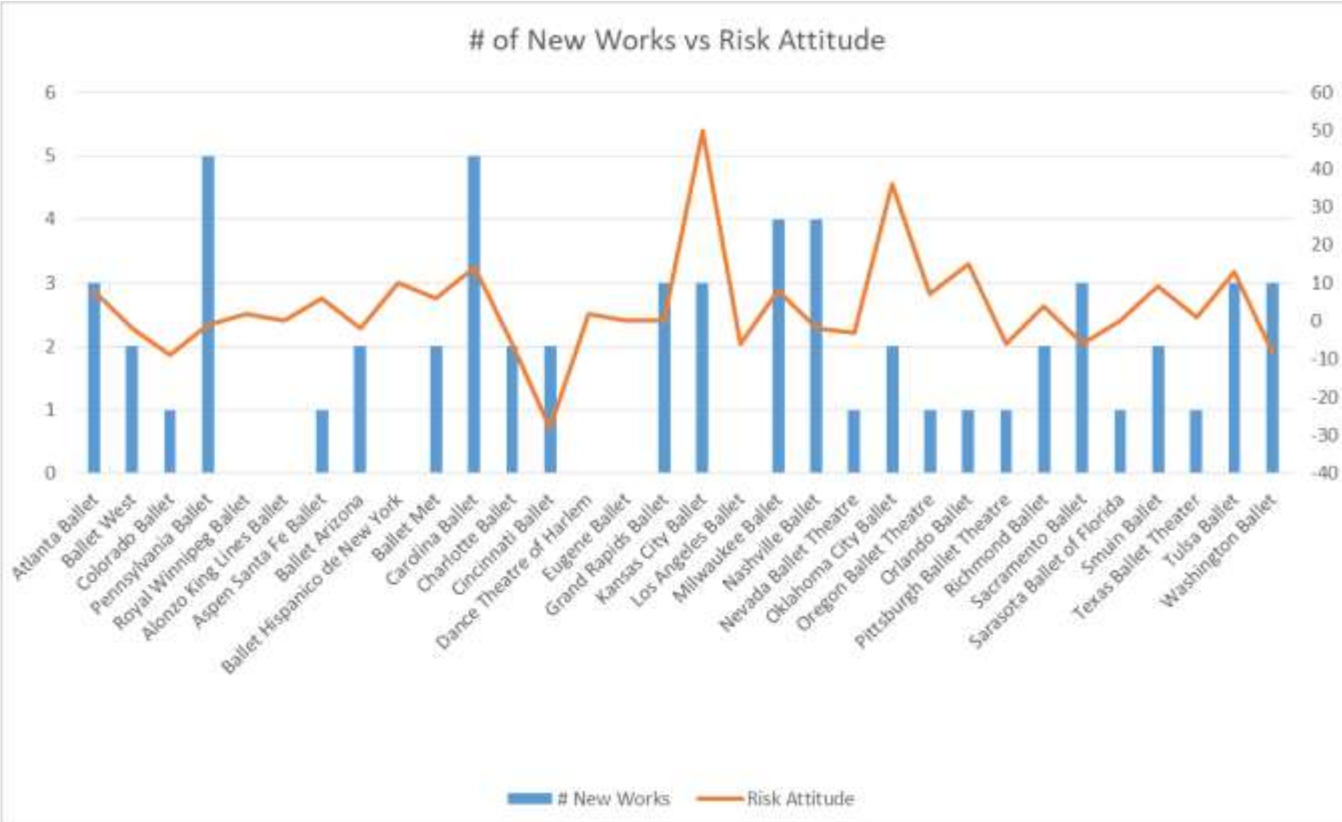
The revenue of 10 companies are increasing at a rate of (6%-15%) more than the rate at which their expense is increasing. This may suggest a risk averse attitude i.e. desire to have cash on hand before spending.

The revenue of 13 companies are increasing at a neutral rate of (-3% to 4%) compared to the rate at which their expense is increasing. This may suggest a risk neutral attitude, neither risk averse nor risk taking.

For 6 companies, their expense is increasing at a faster rate than revenue (-6% to -9%). This may suggest a risk taking attitude i.e. an inclination to spend first before having the cash on hand.

	Company	Rates of Revenue Increase Compared to Rates of Expense Increase	
1	*Kansas City Ballet*	*50%*	*Kansas City Ballet and Oklahoma City Ballet are outliers, with recent spikes in contributed income that suggest an extraordinary event*
2	*Oklahoma City Ballet*	*36%*	*Kansas City Ballet and Oklahoma City Ballet are outliers, with recent spikes in contributed income that suggest an extraordinary event*
3	Orlando Ballet	15%	Risk averse, revenue leading
4	Carolina Ballet	14%	Risk averse, revenue leading
5	Tulsa Ballet	13%	Risk averse, revenue leading (but note recent deficit)
6	Ballet Hispanico	10%	Risk Averse, revenue leading
7	Smuin Ballet	9%	Risk averse
8	Atlanta Ballet	8%	Risk averse, revenue leading
9	Milwaukee Ballet	8%	Risk averse, revenue growth outpacing expense growth
10	Oregon Ballet Theatre	7%	Risk averse, revenue leading
11	Aspen Santa Fe Ballet	6%	Risk averse, revenue leading
12	Ballet Met	6%	Risk averse, revenue leading
13	Alonzo King Lines Ballet	4%	Neutral/slightly risk averse with revenue leading
14	Richmond Ballet	4%	Neutral/slightly risk averse with revenue leading; perhaps extraordinary gift
15	Dance Theatre of Harlem	2%	Risk neutral
16	Royal Winnipeg Ballet	2%	Growth flat
17	Texas Ballet Theater	1%	Risk neutral, pacing equally
18	Grand Rapids Ballet	0%	Rates of increase equal, revenue leading strongly
19	Sarasota Ballet	0%	Rates of increase equal, risk neutral
20	Eugene Ballet	0%	Risk neutral, likely revenue leading (surpluses)
21	Pennsylvania Ballet	-1%	Risk neutral
22	Nashville Ballet	-2%	Risk neutral, revenue leading
23	Ballet West	-2%	Pacing equally/slightly risk taking
24	Ballet Arizona	-2%	Neutral, not clear which leading
25	Nevada Ballet Theatre	-3%	Slightly risk taking, revenue leading
26	Sacramento Ballet	-6%	Slight risk taking, expense leading
27	Charlotte Ballet	-6%	Slightly risk taking, usually surplus so likely revenue leading
28	Los Angeles Ballet	-6%	Slightly risk taking
29	Pittsburgh Ballet Theatre	-6%	Risk taking, perhaps revenue leading
30	Washington Ballet	-8%	Slightly risk taking, expense leading
31	Colorado Ballet	-9%	Slight risk taking when revenue leads (no deficit?)
32	*Cincinnati Ballet*	*-28%*	*Cincinnati Ballet is an outlier, having made an extraordinary grant of $8.5M in 2015; -13% without factoring that grant*
	**insufficient information for Les Grands Ballets Canadiens*		

Chart 11: Risk Attitude Compared to Number of New Works



Of those 10 companies that had 3, 4 or 5 new works[xx], 5 of them were risk averse i.e. cash on hand before spending (Carolina Ballet, Milwaukee Ballet, Kansas City Ballet, Tulsa Ballet, Atlanta Ballet), and 3 risk neutral (Pennsylvania Ballet, Nashville Ballet, Grand Rapids Ballet). Sacramento Ballet and Washington Ballet are slightly risk taking, with expense leading revenue. One consideration is that philanthropy could serve as the risk capital for new works. Companies may be raising funding in advance of the expense of premiering new works. However, because there appears to be no obvious correlation between risk attitude and number of premieres, funding may not be a factor.

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[i] Most notable company closings are Cedar Lake Contemporary Ballet, Trey McIntyre Project and Silicon Valley Ballet/Ballet San Jose. Additional company closures Suzanne Farrell Ballet, American National Ballet, Ballet Pacifica, Jessica Lang Dance, and Moxie Contemporary Ballet.

[ii] https://www.dancemagazine.com/op-ed-its-time-to-talk-about-the-harsh-reality-of-running-a-dance-company-2621796905.html
https://www.sfgate.com/performance/article/Silicon-Valley-Ballet-folds-after-30-years-6877788.php
https://www.pointemagazine.com/red-flags-ballet-companies-2560585815.html
https://www.nytimes.com/2015/03/28/arts/dance/cedar-lake-ballet-to-close-in-june.html
https://www.dancemagazine.com/suzanne-farrell-ballet-last-season-2511373468.html
https://www.washingtonpost.com/entertainment/theater_dance/trey-mcintyre-projects-last-dance-success-kills-a-thriving-company/2014/06/05/c1234942-e82b-11e3-8f90-73e071f3d637_story.html
https://www.dancemagazine.com/american-national-ballet-2501368540.html
https://www.wweek.com/arts/2016/01/20/dancers-from-scandalized-ballet-company-are-starting-their-own/
https://www.latimes.com/archives/la-xpm-2007-mar-28-et-pacifica28-story.html
https://www.washingtonpost.com/entertainment/theater_danc/washington-ballet-is-struggling-with-empty-seats-and-a-3-million-debt-what-will-turn-it-around/2018/10/22/9f05bba0-d0b2-11e8-8c22-fa2ef74bd6d6_story.html
https://www.phillymag.com/news/2017/10/14/pennsylvania-ballet-angel-corella-drama/

[iii] Form 990 tax returns for all US companies were sourced from a https://www.guidestar.org/
Alonzo King Lines Ballet, Form 990 tax returns for fiscal years ending 2015, 2016 and 2017
Aspen Santa Fe Ballet, Form 990 tax returns for fiscal years ending 2015, 2016 and 2017
Atlanta Ballet, Form 990 tax returns for fiscal years ending 2014, 2015, 2016 and 2017
Ballet Arizona, Form 990 tax returns for fiscal years ending 2014, 2015, 2016 and 2017
Ballet Austin, Form 990 tax returns for fiscal years ending 2015, 2016 and 2017
Ballet Hispanico of New York, Form 990 tax returns for fiscal years ending 2014, 2015, 2016 and 2017
Ballet Met, Form 990 tax returns for fiscal years ending 2014, 2015, 2016 and 2017
Ballet West, Form 990 tax returns for fiscal years ending 2014, 2015, 2016 and 2017
Carolina Ballet, Form 990 tax returns for fiscal years ending 2014, 2015, 2016 and 2017
Charlotte Ballet, Form 990 tax returns for fiscal years ending 2015, 2016 and 2017
Cincinnati Ballet, Form 990 tax returns for fiscal years ending 2015, 2016 and 2017
Colorado Ballet, Form 990 tax returns for fiscal years ending 2014, 2015, 2016 and 2017
Dance Theatre of Harlem, Form 990 tax returns for fiscal years ending 2014, 2015, 2016 and 2017
Eugene Ballet, Form 990 tax returns for fiscal years ending 2014, 2015, 2016, and 2017
Grand Rapids Ballet, Form 990 tax returns for fiscal years ending 2015, 2016 and 2017
Kansas City Ballet, Form 990 tax returns for fiscal years ending 2014, 2015, 2016 and 2017
Les Grands Ballets Canadiens, Audited Financial Statements for fiscal year ending 2015
Los Angeles Ballet, Form 990 tax returns for fiscal years ending 2015, 2016 and 2017
Milwaukee Ballet Company, Form 990 tax returns for fiscal years ending 2014, 2015, 2016 and 2017
Nashville Ballet, Form 990 tax returns for fiscal years ending 2016, 2017 and 2018
Nevada Ballet Theatre, Form 990 tax returns for fiscal years ending 2016, 2017 and 2018
Oklahoma City Ballet, Form 990 tax returns for fiscal years ending 2014, 2015, 2016 and 2017
Oregon Ballet Theatre, Form 990 tax returns for fiscal years ending 2015, 2016 and 2017
Orlando Ballet, Form 990 tax returns for fiscal years ending 2015, 2016, 2017 and 2018
Pennsylvania Ballet, Form 990 tax returns for fiscal years ending 2014, 2015 and 2016
Pittsburgh Ballet Theatre, Form 990 tax returns for fiscal years ending 2016, 2017 and 2018
Richmond Ballet, Form 990 tax returns for fiscal years ending 2014, 2015, 2016 and 2017
Royal Winnipeg Ballet, Annual Reports for fiscal years ending 2015, 2016, 2017 and 2018

Sacramento Ballet, Form 990 tax returns for fiscal years ending 2015, 2016 and 2017 [note, for 990 fiscal year ending 2017, the figures reported for prior year differ from the figures reported in the 990 fiscal year ending 2016, most notably the restated numbers include an additional $2M in contributed income for 2016. For the purposes of this paper, the previously published numbers are used because they are reported in greater detail]
Sarasota Ballet of Florida, Form 990 tax returns for fiscal years ending 2014, 2015, 2016 and 2017
Smuin Ballet, Form 990 tax returns for fiscal years ending 2015, 2016 and 2017
Texas Ballet Theater, Form 990 tax returns for fiscal years ending 2015, 2016 and 2017
Tulsa Ballet, Form 990 tax returns for fiscal years ending 2015, 2016, 2017 and 2018
Washington Ballet Form 990 tax returns for fiscal years ending 2014, 2015, 2016 and 2017

[iv] The full quote is: *"small to medium sized companies based in cities outside dance meccas –New York City, Chicago, Los Angeles—are often written off as "regional," or somehow lesser than their big city counterparts."* Ballet Hispanico of New York, Dance Theatre of Harlem and Los Angeles Ballet were included in the study despite being based in the named dance meccas because their budgets were within the study range, $6M, $5M and $3M respectively, whereas Houston Ballet was not included because of its larger budget size.
https://www.dancemagazine.com/ballet-companies-transcending-regional-label-2599584240.html

[v] News articles and peer literature review:
https://www.danceinforma.com/2015/09/02/not-only-in-new-york-ballet-at-its-best/
https://aballeteducation.com/2014/07/14/on-the-rise-5-ballet-companies-to-look-out-for-us-2014-2015-season/
http://www.post-gazette.com/ae/theater-dance/2014/10/19/Pittsburgh-Ballet-Theatre-at-45-has-earned-an-international-reputation/stories/201410190013
https://www.dancemagazine.com/what-makes-a-principal-2307037373.html
https://www.dancemagazine.com/atlanta-ballet-names-a-new-artistic-director-2307012354.html
https://www.dancemagazine.com/the_latest_has_ballet_bounced_back_-2306950319.html
https://www.dancemagazine.com/dance-season-preview-2018-2019-2596711604.html?rebelltitem=22#rebelltitem22
https://www.dancemagazine.com/yes-it-is-possible-to-build-new-ballet-audiences-in-2017-2476154769.html

[vi] Prestigious Awards and Grant Funding:
Dance Magazine Awards https://www.dancemagazine.com/dance-magazine-awards-2601939575.html
National Medal of Arts https://www.arts.gov/honors/medals/last-name-all:
National Endowment for the Arts: https://apps.nea.gov/grantsearch/
Canada Council for the Arts https://canadacouncil.ca/research/data-tables

[vii] https://www.musicalartists.org/about-agma/signatories/

[viii] https://www.caea.com/Dance/Agreements-Policies

[ix] https://culturaldata.org/the-fundraising-report/return-on-fundraising-index/key-findings/

[x] According to SMU Data Arts, the average fundraising ROI for dance organizations is $8.69 (note, SMU Data Arts includes in-kind donations in their calculation, which are not included in this study, skewing the ROIs calculated here lower). Of the 4 US companies in the case studies, only Pennsylvania Ballet had an ROI higher than $8.69.
https://culturaldata.org/the-fundraising-report/return-on-fundraising-index/trends/; https://culturaldata.org/the-fundraising-report/return-on-fundraising-index/more-details/

[xi] The United States Office of Management and Budget (OMB) has defined 383 metropolitan statistical areas (MSAs) for the United States and seven for Puerto Rico. The OMB defines a Metropolitan Statistical Area as one or more adjacent counties or county equivalents that have at least one urban core area of at least 50,000 population, plus adjacent territory that has a high degree of social and economic integration with the core as measured by commuting ties. https://en.wikipedia.org/wiki/List_of_metropolitan_statistical_areas

[xii] https://en.wikipedia.org/wiki/List_of_regions_of_the_United_States

[xiii] https://en.wikipedia.org/wiki/List_of_United_States_metropolitan_areas_by_per_capita_income
https://en.wikipedia.org/wiki/List_of_highest-income_counties_in_the_United_States

[xiv] https://culturaldata.org/what-we-do/for-arts-cultural-organizations/the-cultural-data-profile/

[xv] Atlanta Ballet (Artistic Director Gennadi Nedvigin, 2016), Carolina Ballet (Artistic Director/CEO Zalman Raffael, 2019), Charlotte Ballet (Artistic Director Hope Muir, 2017), Grand Rapids Ballet (Artistic Director James Sofranko, 2018), Les Grands Ballets Canadiens (Artistic Director Ivan Cavallari, 2017), Nevada Ballet Theatre (Artistic Director

Roy Kaiser, 2017), Sacramento Ballet (Artistic Director Amy Seiwert, 2018), Washington Ballet (Artistic Director Julie Kent, 2016)

[xvi] https://artandseek.org/2017/10/27/arts-critics-are-disappearing-from-newspapers-or-wait-is-that-the-good-news/

[xvii] https://culturecounts.cc/about/

[xviii] https://www.artscouncil.org.uk/quality-metrics/quality-metrics

[xix] https://culturecounts.cc/ace/

[xx] https://www.dancedataproject.com/