



RAISING THE TECHNOLOGY SUCCESS STORIES FROM PERFORMING ARTS LEADERS AND ARTISTS CURTAIN

BRETT ASHLEY CRAWFORD, PhD
PAUL HANSEN

WILEY

Praise for *Raising the Curtain*

"I'm excited about this book—I don't think there's anything like it out there. I Google things, but would have loved to have a book like this so many times."

—Dane Toney, project and media specialist at Attack Theatre

"This book is a needed offering in the world. It's so important and it really will help."

—Stephanie Martinez, artistic director at PARA-MER Dance Theatre

"As we know, nearly every aspect of modern life intersects with technology—and the performing arts are no exception. Brett Ashley Crawford and Paul Hansen, in their excellent new book, *Raising the Curtain*, remind us that this can be a good thing! Each thoughtful and thorough chapter artfully demystifies the ever-changing landscape of our digital world—and provides clear examples of how to best deploy software and other applications in a way that makes work easier and more efficient for artists and arts administrators. Dr. Crawford and Mr. Hansen have cut through the noise and demonstrated a true philosophy around technology in our field, while also showcasing real, actionable tactics that can be implemented into your practice right away."

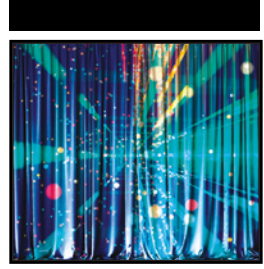
—James McNeel, managing director, City Theatre Company

"I think this book is great—something really special here."

—Juan José Escalante, executive director at Miami City Ballet

“This book offers a framework and guide for people in [performing arts] institutions for ways how technology can aid their organizations.”

—**Scott Penner, freelance set and costume designer**



Raising the Curtain

Technology Success Stories from
Performing Arts Leaders and Artists

Brett Ashley Crawford, PhD
Paul Hansen

WILEY

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Introduction

In the performing arts, our goal is to create great art and programs that connect with audiences and communities. Getting to opening night requires managing people, money, and materials. In other words, great art requires a great business model that includes the smart use of technology, from artistic creation to administration to community connection to reaching donors.

Digital transformation is continually changing how we make art, run businesses, and even live our lives. In this book, you'll find stories about nonprofit organizations, artists, and the technology they use to achieve success.

The performing arts are struggling to emerge from the COVID-19 pandemic in the United States and other countries around the globe. Audiences have yet to return to pre-pandemic numbers, subscriptions are faltering, and donors are receding. Bluntly, if you look at the numbers over time, the performing arts have been losing audiences and relying on long-term, big-money donors for more than a decade. Recent headlines in the media too frequently highlight organizations canceling shows, shrinking seasons, or ceasing operations altogether, striking fear in the hearts of many. There is a path forward. Lessons can be learned from the many organizations running efficient and effective operations—they pay their bills, run full seasons, and operate robust enterprises. These are the stories you will read in this book.

In our post-pandemic, AI-infused world, arts success stories are fueled by using technology and data in new ways to grow their business operations and innovate productions. Colleen Dilenschneider, a cultural leadership consultant who maintained an ongoing data analysis of audiences and marketing throughout the pandemic, found that organizations that invested in their infrastructure and continued engaging with their communities are finding audiences and donors return and even grow.

Harnessing technology to fuel success is the point of our book. We are both lifelong performing arts professionals working in production, management, and education. Our heart is in the work and the transformative power of the arts—we know that the performing arts can change lives. One of the keys to success, in our experience, is empowering people to use the tools available to them.

We're both "accidental techies" in our careers in the arts, filled with passion and curiosity. We discovered the efficiencies and impact that can be gained by using technology. We were simultaneously dismayed when we realized how many of our friends and colleagues were missing opportunities due to legacy (old) systems, missing integrations across departments, siloed systems, or the right tech in the wrong hands.

We have taken our combined 50 years of experience and added to it. Instead of offering two perspectives, this book brings together the innovative work of organizations and artists across multiple disciplines (jazz, symphony orchestras, choruses, contemporary dance, ballet, theater, opera, and more). Our interviews are with people working in jobs from marketing and fundraising to diversity, equity, accessibility, inclusion (DEAI), production, and information technology. The power of harnessing data and tech for transformational outcomes is revealed through their stories. Throughout the book, their words bring their work to life:

"The arts, by nature, are always evolving. You might take a piece of music that was written 400 years ago, and a new choreographer will take that music and create something that has never been seen before. We have to embrace technology in order to keep up with the evolution of the art form itself."

—Juan José Escalante, executive director, Miami City Ballet

"How you innovate is you solve the problems as they come."

**—Denise McGovern, vice president of
communications + media, Dallas Symphony Orchestra**

“I use data to make strategic decisions as a leader in the organization. We serve our customers in the way that they have come to expect of the world. We exist in the same world as Amazon and Target and the rest of them. So, our interactions need to be the same.”

**—Larae J. Ferry, director of marketing, Alvin
Ailey American Dance Theater**

Raising the Curtain can't tell the story of every artist and performing arts leader finding success using technology. We have attempted, however, to provide examples of many different tactics, strategies, and tools. There are more examples of success across the performing arts than could ever be included in one book.

By providing a breadth of voices and experiences, *Raising the Curtain* serves arts administrators, board members, designers, and artists. We hope you'll find inspiration and solutions for your problem areas. This book can be read cover-to-cover or by diving into a chapter that covers a specific area you're working on.

New technologies enter the market daily. This book could never hope to be exhaustive in every solution, nor do we only highlight the most “cutting-edge” tech. We all know that whatever is cutting-edge today is soon considered the norm or, even worse, so trendy it quickly becomes obsolete. We also share how some of the simplest technologies are often the best for the job.

Finally, we know that stories of great success didn't just happen. Incorporating technology into a personal workflow or an organization is difficult. Change management is a considerable part of the process. Hence, many interviewees provide examples of successfully incorporating a particular process or technology. Training and skill development are essential, as is socialization across the organization in small steps.

Maintaining a digital ecosystem is increasingly the foundation of effective and efficient business practice. We wrote *Raising the Curtain* in an effort to demystify technology and support performing arts organizations and artists in their quest to find efficient and effective solutions to the problems they face. Although any technology described in this book may have a new version or be out-of-date by the time you read this book, we hope you'll use these stories for inspiration in the way it is being incorporated and as a starting point to find the right tech solutions for your needs.

Getting on the Same Page: Efficient Internal Communication + Project Management

Technology is a tool, a collaborator, that supports business operations in a significant but subtle way. While it would be wonderful to simply add on a technology to the workplace and have it magically solve our problems, that is rarely the case. Yet, when intentionally selected and implemented, technologies in the workplace have proven time and again that they can save time and headaches, therefore increasing the impact of our work.

In our experience as artists, freelancers, and arts administrators, the technology we use has often saved the day, but to be honest, it has also sometimes created massive headaches. This chapter will share our experiences as well as those of several theater, dance, and music companies. These success stories of creating and using institutional systems will reveal how they decrease “one more dead-end email chain” and increase clarity of purpose, priorities, and workflows.

The chapter begins with the frameworks of how our work systems and environments have changed over the years before we dive into knowledge management and how to increase institutional memory, efficiency, and job satisfaction day to day. The arts are a people business, so we’ll also discuss how we can create better models for communication. The technology solutions that we’ll investigate are software-as-a-service

(SaaS) models for workflow management. None of this works independently or is adopted without intention and training. The chapter wraps up with how to best train and maintain these systems in a world that is ever-changing.

Times Change, but How Do We?

Running arts organizations or pursuing artistic careers is far more complicated than most people think. Brett often equates it to running a start-up with a constantly changing product. But technology can help with the overall management of your creative enterprise. An early technology adopter, Brett began creating systems for documents and contracts in her first job in a three-person off-Broadway theater in the year 1992. This was the age of 3.5" computer discs that you inserted into a computer because the memory inside the computer was tiny and mostly used for processing. Of the three employees, only two were comfortable with computers. The artistic director was not, but he supported the time it took to implement the tiny system and liked that things could get done efficiently.

In a three-person organization, space was limited: a theater and a small office. While there were production meetings, staff "meetings" were more often conversations around morning coffee. The ease of communication was simple and production focused. Three brains, lots of three-ring notebooks, file cabinets, and one computer with 3.5" discs served as the knowledge system. It was fun but highly inefficient, with a lot of running up and down the stairs to the theater.

By 2006, Brett was the managing director for Imagination Stage, and the world had changed with respect to the technology available. But the systems that existed were happenstance. A system of shared knowledge of what goes where, how to communicate clearly, and how to prioritize still had to be created, communicated, and used. The company was also much bigger, with 52 full-time and 275 part-time artists, teaching artists, and over hire. Email predominated communication, and shared file folders on a server were common.

But problems existed. Younger staff had no sense of what the priorities were, especially which email needed the first response. Seniority, not mission or impact, often determined who had access for space. Eventually, a new software tool for space management provided a decision tree and transparency—40,000 square feet, seven classrooms, two theaters, and various other public spaces require coordination for facility

management and maintenance. Additionally, the staff created a company-wide agreement for communication protocols (email priority systems, calendar appointments instead of email chains for meetings, etc.).

When Paul was the marketing director for a midsized dance company, communication about projects, workflow, and related responsibilities was not consistent. Even with an administrative staff of four, there was no system in place for sharing of internal information, which often led to duplicated work and missed opportunities. And often the first email in a chain was responded to instead of someone reading the entire chain on a given topic, wasting more precious time. Each staff member was great at what they did in their respective areas, but the lack of an organized system created more work and harmed efficiencies.

It is hopefully becoming clear that creating ecosystems of technology can make work easier but that doing so requires more than a standard, top-down approach. Senior and junior employees need buy-in and training. Any adopted technology solution will have to adapt over time. Hence, you will find ample explanations of not only useful tech solutions, but also conversations around how the employees are trained, how systems are created, and how the habits of work are changed, also known as *change management*.

It cannot go without saying that the global pandemic and lockdown had an immense impact on the way we all work. However, the need for clear and efficient internal operations existed prior to the pandemic. The only critical change noted over and over again in interviews was the need to rely on cloud-based solutions.¹ The organizations and individuals succeeded before, during, and after the pandemic because of clear and clean systems that could expand and contract as workflows changed.

Moving out of lockdown into the current day, hybrid and remote work continues to be a recognized and often successful solution for many organizations. But even if your organization has returned to 100 percent in-office, creating internal systems of knowledge sharing, communication, and workflow will undoubtedly contribute to greater success. The overarching system or technology framework has to facilitate person-to-person and team-to-team processes. And, most importantly, it must support the mission or purpose of the work overall.

¹In this circumstance, interviewees were addressing external server-hosted content. Cloud computing can also be on-premises private servers. Hybrid infrastructures use both; internal servers are used for applications that have issues that must be addressed, and latency, governance, or security issues are better suited for on-premises operations. Video content for use in a production environment would meet that need.

How Knowledge Systems Create Success

Systems allow for work to proceed with ease. If an employee knows where to find a file, how to get the answer they need, or what the top priorities of their day are, work flows efficiently and effectively. The problem is that most organizations and individual businesses create “accidental” systems. These systems are created to serve the person who created them, with little thought to how they connect to the rest of the operations of the organization or fellow employees. We all know when something takes longer than it should, but it is rare that time is spent trying to fix the cause (“No one codified where to put the files in the drive”); rather, we often fix the system (“I’ll put my work where I need it over here”).

This is not a technology-based problem. When we had a world of documents, file folders, memos, and sticky notes, *how* the filing system was created was usually driven by one person in the organization. People who needed a file repeatedly would keep it (or a copy of it) on their desk. These breaks in the paper system would leave people looking for files, or lead to confusing the version history of a document (“How do you have the newest document—the file folder says the last one was edited on X date?”).

It is also important to note that knowledge management has been a part of business structure for centuries, most often managed and transferred through a process of coworking and training. Small business owners would pass their knowledge on to the next generation through lived experience. Those working in trades would pass their knowledge through apprenticeship.

It wasn’t until the 1990s that CEOs started talking about *knowledge management*—perhaps because the media and the web encouraged a new language for discussing the work of a new knowledge economy. According to *Harvard Business Review*, there are two approaches to knowledge management. When knowledge is managed in computer systems, it is a “codified” strategy. The second leans on the person-to-person transfer of knowledge, which if intentionally done is a “personalization” strategy. Choosing between the two is a choice and a strategy for a business. If a business wants to grow, codification is the right choice:

The codification strategy opens up the possibility of achieving scale in knowledge reuse and thus of growing the business.¹

So what does it mean to *codify* your knowledge? In simple terms, it is a way of breaking down information (often stored in files or folders) into a transparent system that all the appropriate users can access to do their work and achieve their goals. For performing artists and organizations, often our collective shared knowledge exists in “siloes” tied to performances or shows. The following is a way of thinking about materials:

- Materials that will be reused by many people, teams, or departments.
 - Materials should be centrally located for all access (e.g., an employee handbook) or by department (e.g., a marketing style guide or logos).
 - Consider whether the materials will need to be updated and, if so, when.
 - If often, consider a wiki or internal-facing web page instead of a fixed PDF or other document.
- Materials that will be used once or within a time frame.
 - Materials should be located within a system of folders and names that align with the uses (e.g., 22-23 Production Name or 22-23 Season Marketing).
- People to documents: Create a flowchart of who uses or needs access to what materials and establish a permission tree that matches these needs.
 - Barbara needs to view document X. Donald needs to edit document X. Both have access to the document, but they have different permissions. Permission trees are important and need to be transparent (tell employees: you are being given *edit* access to Y drive and *view* access to Z). Permissions prevent accidental removal/deletion, but more important, they create a cleaner, expanded view and path for each employee. Employees see only what they need to do their work.

- Training employees is part of the strategy. Never assume anyone knows how to use your technology. They may be masters of the system at their previous position, but every software and codification is different. This is true regardless of age. No one is born knowing business technology, although we can all manage our personal devices. Employees still need a tutorial explaining how your company manages logins and how to navigate the system you or your organization have created.
- Buy-in/change management is necessary for effective implementation. Everyone has to use the system or it simply won't work. Creating rewards or positive public praise for people who use the system and add their materials appropriately is key.

The Producing Artistic Director and IT Director/Company Dancer at Attack Theatre were interviewed to gain a better sense of how knowledge management systems can work for a midsized contemporary dance company. Attack Theatre was founded in 1994 as a collaboration between two dancers, Michele de la Reza and Peter Kope. Its mission is to explore artistic expression in its commitment to remain curious in its investigation of new ideas; to artistically collaborate through deliberate, interdisciplinary partnerships; and to connect with local and global communities to provide accessible creative learning opportunities. To accomplish its mission, the company offers a performance season that includes original work choreographed by the company and collaborative work with other institutions, adult education courses, public school partnerships, and community education programs. The company also tours its work across the United States and beyond. As a midsized contemporary dance company with an operating budget of \$1.2 million annually, it pays a staff and a company of dancers, with additional part-time staff totaling 13 and an additional 65-plus artists and teachers throughout the year. The company opened its first permanent home in Lawrenceville, a neighborhood in Pittsburgh, in 2021. A succinct description would be a company that is small with outsized impact and operations.

To achieve more than a typical company of their size might, Attack Theatre began investing in technology systems several years ago. The goal was to increase work efficiency. In 2019, they invested in Egnyte, a knowledge management system. Egnyte is a secure hosted file management platform. It includes layers of security, privacy, and compliance beyond a typical sharing/collaboration system with permission controls. The change to Egnyte saved time prior to the pandemic and

was critical to operations afterward. As Dane Toney, a company dancer at Attack Theatre and its IT manager, explains:

Egnyte is pretty much our sole server. It houses everything—I mean everything. It was set up right before the lockdown. Before that all our servers were based on hard drives in the office. You could access them remotely, but it was very difficult and very, very slow.

Speed is particularly important when working with larger files typical to a dance company like Attack Theatre. Content spans all documents, all music, video, photos, and archival materials.

When asked how moving to Egnyte revolutionized their work, both Toney and de la Reza note a multitude of impacts. For example, “We don’t have 14 versions of the same document when editing grants” because of Egnyte’s reliable version history system. Furthermore, it increases security and customization of users, which they find particularly helpful with an increased reliance on freelance workers. For example, Attack Theatre is currently working with an external public relations firm and graphic designer. They now share specific Egnyte folders with a specific permission level and an expiration date. This approach saves time and future headaches since there is no need to remember to go back and reverse permissions. Similarly, dancers have increased engagement in the system and access to files. De la Reza notes that “This changes communication flow and increased efficiency.” Both Toney and de la Reza acknowledge that although Egnyte is powerful, it can take an additional level of training to understand a different logic and architecture. Admittedly, it is also more expensive than some of the integrated workspace solutions available to nonprofits. Toney notes that “Egnyte is expensive and powerful.” They plan to continue to grow into using advanced tools of the system.

One of the oft-mentioned benefits of creating a system of organized and accessible materials is that employees can work independently. Providing the ability for staff to complete a project from beginning to end without waiting for someone to give them something, thus slowing down their process, increases worker satisfaction because they can self-actualize. Data from the “great resignation” of 2021 clearly demonstrated that people left jobs due to a lack of work satisfaction. Increasing a sense of satisfaction with one’s work should, therefore, support internal commitment to a company. Creating a technology infrastructure that increases a sense of