



From Design to Dissemination: Digging into Assessment and Evaluation

**League of American Orchestras 2014
Annual Conference**

June 5, 2014, 3:00 – 4:00 p.m.

**Jon Weber, Chicago Symphony Orchestra
Alan Brown and Dennie Palmer Wolf, WolfBrown**

Introductions: The People and the Project

- Jon Weber, Director of Learning Programs, Institute for Learning, Access, and Training, The Chicago Symphony Orchestra
- Alan Brown, Principal, WolfBrown
- Dennie Palmer Wolf, Principal, WolfBrown
- 3-year joint evaluation project



Agenda

- Introductions and Overview
- Big Idea: Inquiry-driven data collection
- CSO & WolfBrown partnership: Three examples of Inquiry-driven data collection
 1. Focus Group work: How do we build the arc of engagement?
 2. Survey work: installing an ongoing assessment capacity
 3. Data Partnership with Marketing: How do we build life-long affiliation with the orchestra and live music?
- Discussion and wrap-up



Inquiry-driven Impact Assessment

- **Impact assessment:** A look at the full range of immediate, short, and longer term effects of a program on its participants
- **Inquiry-driven:** All data collection should:
 - Help you answer an important question at the core of how you design and conduct programs
 - Yield actionable findings (e.g., make a difference), helping you to “curate” every aspect of what you do
 - Engage as many staff/departments as can contribute to the effectiveness of your programs



Programs of the Institute

LEARNING FOR STUDENTS AND YOUNG MUSICIANS. BROAD **ACCESS** FOR DIVERSE AUDIENCES. INTENSIVE **TRAINING** FOR MUSICAL AND PERSONAL DEVELOPMENT.

CITIZEN MUSICIAN INITIATIVE

A stream of programming that collectively reaches people of all ages in a variety of community locations including hospitals, churches, elementary schools, high schools, universities, retirement communities and orphanages. Programmatic aspects of the »

Citizen Musician Initiative include musical projects designed and implemented by CSO musicians; activities with the CSO on tour and free concerts presented by the CSO in community venues across Chicago.

CSO EDUCATION

OPEN REHEARSALS

Open rehearsals for high school students with a serious interest in music. Rehearsals are followed by a Q&A with guest conductors and members of the Orchestra.

CHICAGO YOUTH IN MUSIC FESTIVAL

Presented in partnership with Chicago's leading organizations in music education, this biennial festival unites young musicians from across Chicago and the world for a celebration of youth in music.

CRAIN-MALING FOUNDATION CSO YOUTH AUDITIONS*

An annual competition for exceptional young musicians. The winner performs a solo as part of CSO Youth Concerts.

AT-RISK AND INCARCERATED YOUTH

Concerts and musical training opportunities for youth at the Cook County Juvenile Detention Center and Illinois Youth Center, Warrenville.

YOUTH CONCERTS

Full CSO concerts featuring the winner of the annual Crain-Maling CSO Youth Auditions.

MUSIC ACTIVITY PARTNERSHIP

A three-year partnership with select CPS schools that introduces students to a symphony orchestra.

PERCUSSION SCHOLARSHIP PROGRAM

An intensive group and individual lesson training program for young percussionists.

UCW PARTNERSHIP

Workshops and in-school performances with Civic musicians and CSO teaching artists for students and faculty at the University of Chicago Charter School, Woodlawn.

DREAM OUT LOUD

A set of posters and videos that utilize stories of CSO musicians to inspire young musicians to continue their musical studies.

ORCHESTRA EXPLORERS®

Curriculum materials that introduce students to classical music while supporting learning in a variety of core academic areas.

VERY SPECIAL PROMENADES & CSO FAMILY MATINEE SERIES

Full CSO concerts that incorporate extra-musical elements to enhance learning.

ADVENTURES IN MUSIC*

Partnerships with 10 community-based organizations from across Chicago. Participants receive free tickets to CSO Family Matinee concerts as well as pre-concert visits by small ensembles of CSO musicians and CSO Docents.

ONCE UPON A SYMPHONY®

Concerts featuring CSO musicians, a storyteller and visuals presented in partnership with the Chicago Children's Theater.

DOCENT PROGRAM*

School visits and workshops led by trained docents that prepare students for concerts.

CIVIC ORCHESTRA OF CHICAGO

A training orchestra for emerging professional musicians that offers free concerts at Orchestra Hall and around greater Chicago.

CITIZEN MUSICIAN FELLOWSHIP PROGRAM

An intensive training program for select Civic musicians that builds and refines the skills necessary to be responsive, communicative, entrepreneurial and empathetic culture workers of the 21st century.

MUSICORPS®

A program for select Civic musicians that offers training in delivering chamber ensemble performances for school and community audiences.

SIR GEORGE SOLTI CONDUCTING APPRENTICESHIP

An international competition for emerging conductors. The winner is awarded an apprenticeship with CSO Music Director Riccardo Muti.

CSO COMMUNITY OPEN REHEARSALS*

CSO rehearsals led by Riccardo Muti and open to invited groups of seniors, veterans and other members of the CSOA family.

PRE-K

K-3RD GRADE

4TH-8TH GRADE

9TH-12TH GRADE

YOUNG ADULT

ADULTS

*This program is coordinated by members of the League of the CSOA.



Major components of evaluation

- Review and revision of guiding language
- Development of tools to assess programs using a common set of metrics
- Development of tools to look deeply at individual programs' impact
- Staff capacity building
- Metrics for assessing Institute programs over time, beyond ticket sales, “hits”, to impact



Perfect Score (Example Only)

FINANCES

Income Relative to Expense

Fundraising

Generate Income

Communication

Extends Opportunities

Builds Skills and Commitments

CITIZEN MUSICIANS

Consultative Design

Alignment to Goals

Distinctiveness of Design

Program Delivery

Support Materials

Impact/Transformation

Communications

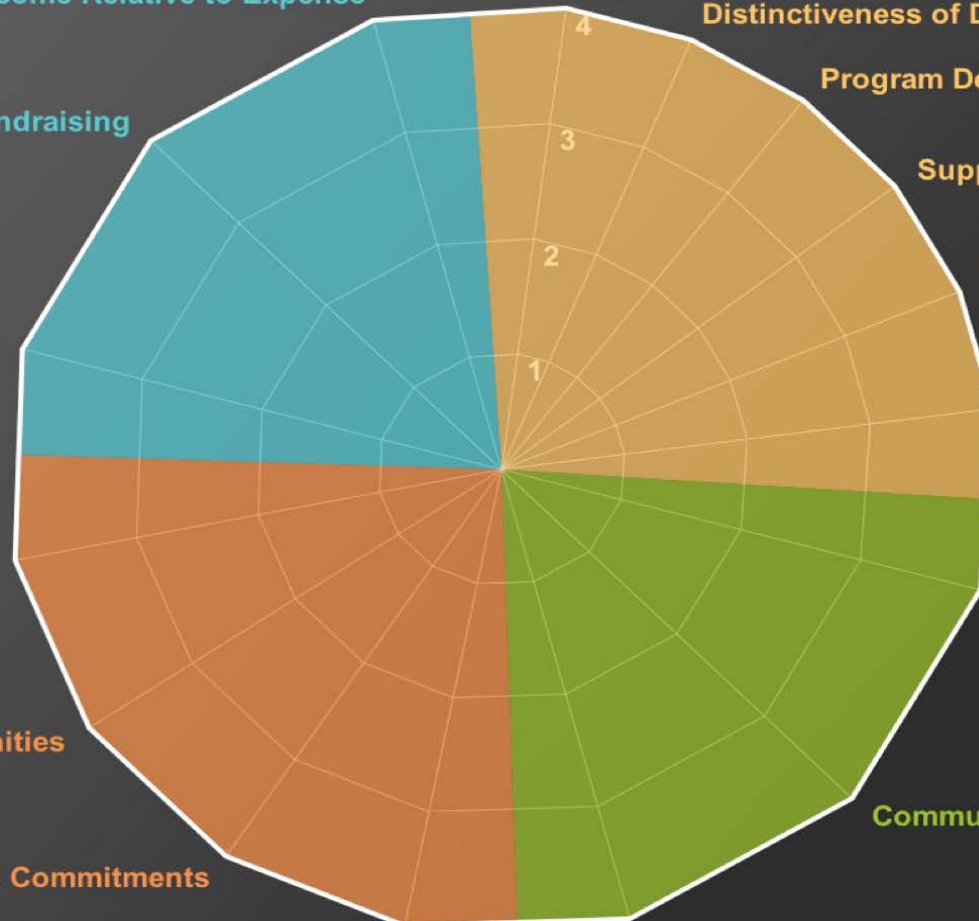
Diversity

Community Partnerships

Continuity of Engagement

DIVERSIFYING PARTICIPATION

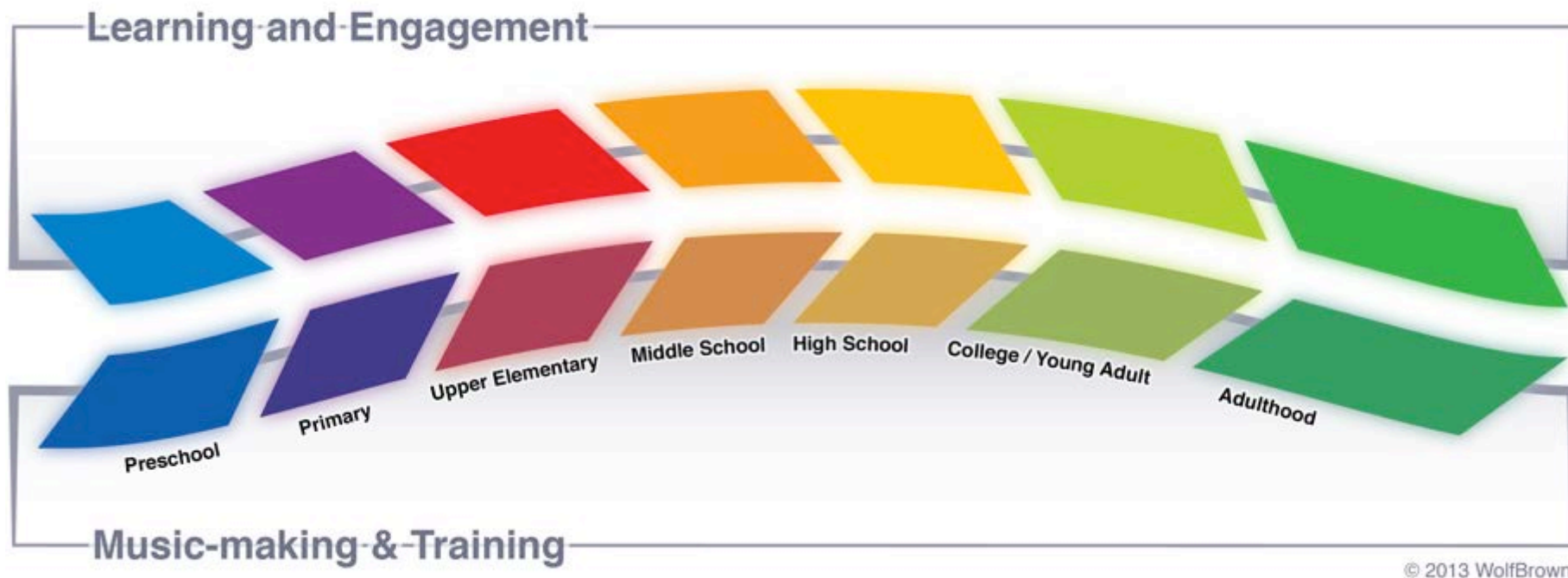
EXCELLENCE IN PROGRAMMING





One major recommendation: Two continuous pathways

Lives in Music



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Pathways of Participation in Classical Music



Case Study: Family Matinee Concerts



Inquiry-driven Impact Assessment

Family Matinee Concerts

- What draws patrons to these concerts?
- How do families currently engage with these concerts?
- What are the most impactful elements of the concerts?
- Where are the places where we could deepen engagement for any specific event?
- How could we build the long-term engagement of families?

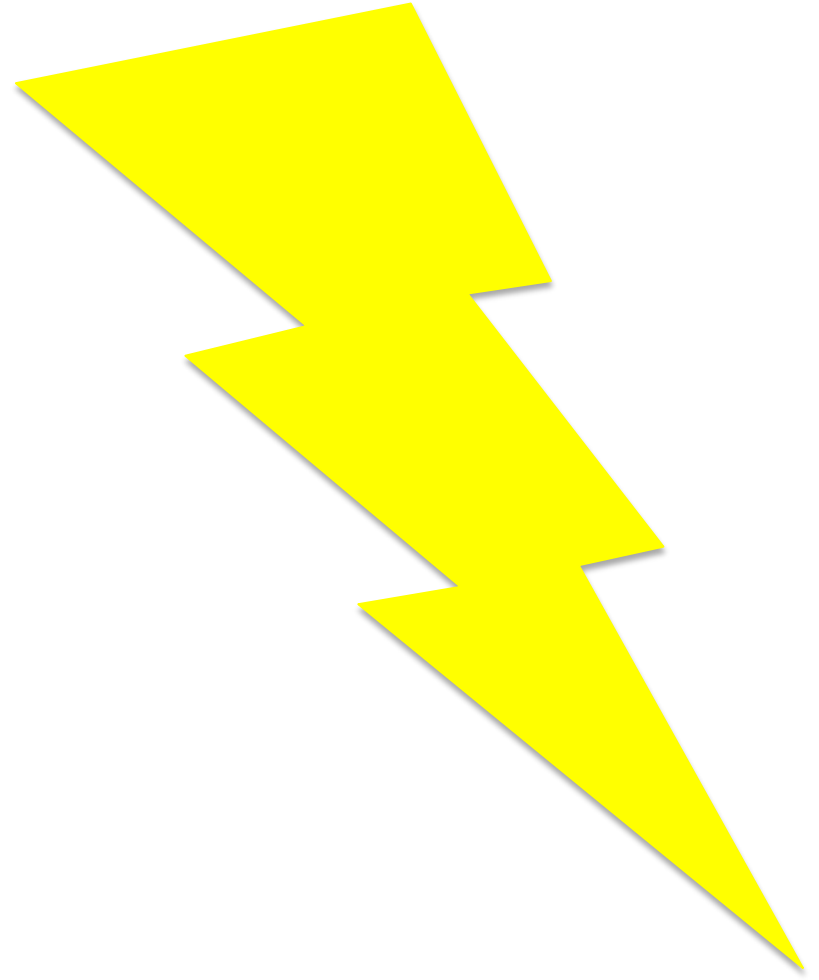
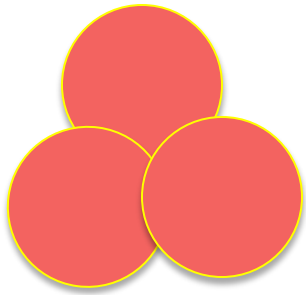
1) Focus Group Methodology:

The Inquiry:

What's the arc of engagement for a concert?
How do we build that arc into longer-term loyalty?

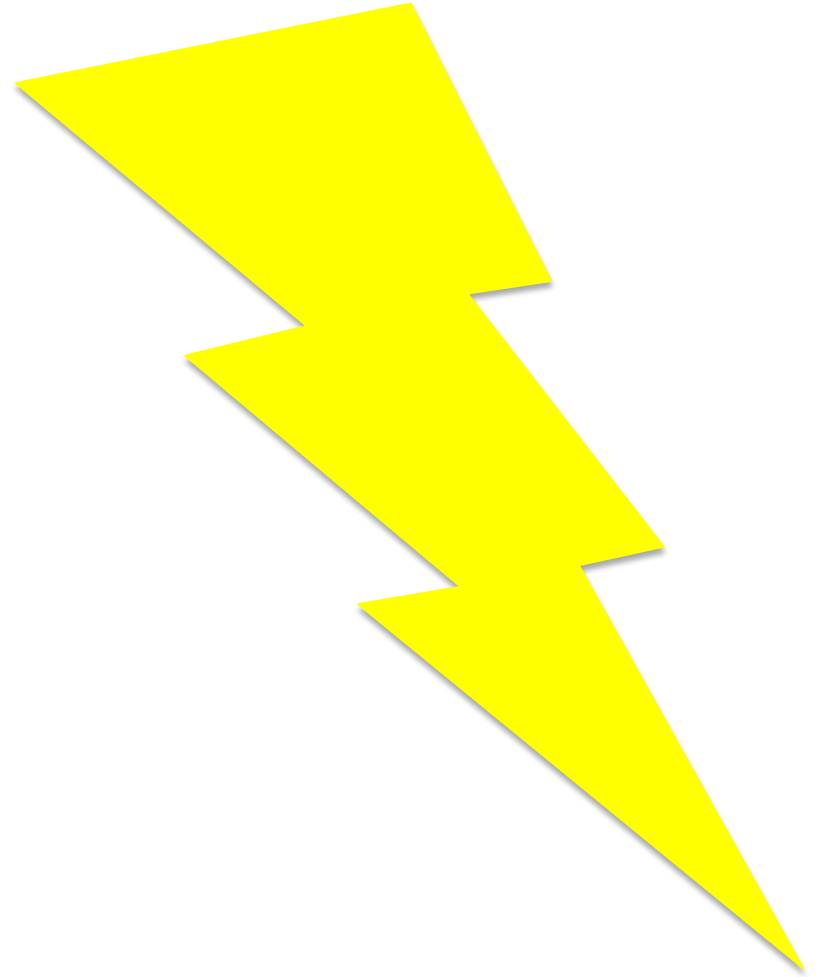
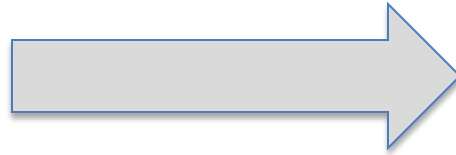
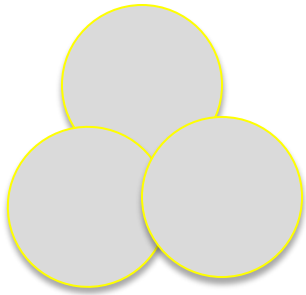


Two “Formulae”





Two “Formulae”





Focus Group Research Goals

- What makes for engagement?
- What is the arc of engagement from week prior to the week following the concert?
- What do the data suggest about increasing engagement? In a single concert? Across concerts? Across the age span?



Details of Methodology

- Collaborative design of Family Engagement booklet linked to concert content
- Enroll participating families in tracking what they do (Total n = 23, across two sessions)
- Focus group Interviews with staff post concert
- Phone interviews a week later
- Mail back booklets
- Code data into themes, simple graphics, draw implications
- Two rounds: February, May





What is the arc of engagement?

- There can be a much longer arc of musical engagement
 - Anticipation phase is especially “ripe” for extension
 - Desire for portable, quick-access, web-based materials (as compared to print booklet ahead)
 - Just-in-time invitations
 - Refreshed pre-concert rotunda activities
 - “Make-a-day of it” profiles
 - Can be a much larger part of family life, especially for subscribers over time

Possibility of a Life-span Approach

- Potential to be a 3-generational event
- Parents and grandparents want to invest in “passing on” tradition of live music
- Families don’t want their adolescents “age-ing out”, want to continue the tradition
- But the longer “arc” breaks at pre-teen years
- Conventional wisdom “That’s just what happens.”
- But does it have to?



2) Survey Methodology:

The Inquiry:

What is the current impact of a single performance?

Could that be increased?

How?

Survey Research Goals

- Measure the impact of Family Matinee programs on children and families
- Inform the design of future programs
- Design and test a new feedback system with CSO audiences & staff



Topics

- Social construction of the visit
- Reasons for attending
- Preparation: attitudes and behaviors
- Child's experience at the concert
 - Anticipation, captivation, social interaction
- Adult's impressions of the program
 - Tied to outcome rubric developed for the Institute
- Family outcomes

Sample questions

- In general, how do you feel about doing activities with your child(ren), either at home or at Symphony Center, in order to enhance their experience at concerts?
 - I feel strongly that preparing makes a difference in my child(ren)'s experience of the concert
 - I feel somewhat strongly, or have mixed feelings about it
 - I don't feel that preparing makes a difference to my children's experience of the concerts

Sample Questions

- Did you do any activities with your child(ren) prior to the concert, with the specific intention of building their excitement for the concert, or enhancing their learning?
 - Yes/No

Sample Questions

(in reference to the youngest child in the party over 5 years of age)

- What was this child's level of excitement or anticipation leading up to the concert?
 - Scaled response: low to high
- What contributed most to heightening this child's level of excitement in advance of the concert?
 - open-ended response
- Overall, how captivated or absorbed was this child during the concert? In other words, how well did the concert hold his or her attention?
 - Scaled response: low to high

Sample Questions (adult's impressions)

- With its family concerts, the CSO strives to strike a balance between programs that are fun/entertaining and programs that are educational. How did we do for this program?
 - Too entertaining, and not educational enough
 - Good balance
 - Too educational, and not entertaining enough

Sample Questions (adult's impressions)

- Rate your opinion of the program on each of the following elements.
 - Quality of the design of the artistic program – how well conceived was this program in terms of the selection of pieces, educational content, etc.
 - Quality of the music making by the conductor and musicians of the CSO
 - Quality of support you received from the CSO in maximizing the impact of the program for your child(ren)

Sample Questions (Family Outcomes)

- To what extent have your experiences at Family Matinee concerts served to strengthen your relationships with the children you bring to these concerts?
- To what extent have your children's experiences at Family Matinee concerts served to expand their musical interests, or awaken an appreciation for classical music?

Dashboard Reporting Tool

ADMIN.INTRINSICIMPACT.ORG/WolfBrown

[DASHBOARDS](#)[SURVEYS](#)[QUESTIONS](#)[ORGANIZATIONS](#)[USERS](#)[WolfBrown](#)

weberj@cso.org

CHICAGO
SYMPHONY
ORCHESTRA

WELCOME TO YOUR CUSTOM DASHBOARD!

Select a report below to explore your survey data.

[EDIT DASHBOARD \(Chicago Symphony Orchestra\)](#)

Demographics

Buyer Behavior

Anticipation & Impact

YOUR SURVEY RESPONSES

Family Matinee: Adventures with Aladdin	221
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ADMIN.INTRINSICIMPACT.ORG/WolfBrown

[Demographics](#) [Buyer Behavior](#) [Anticipation & Impact](#)

ANTICIPATION & IMPACT

[edit report](#)[clear cache](#)[debug](#)

1 PROGRAMS

[Select All](#) [Select None](#)☒ Family Matinee: Adventures with Aladdin[\[edit\]](#)

2 FILTERS

Performance Time

(No Filter)

Performance Time

Method

Age (3 Cohorts)

Youngest Child's Age

Relationship to Children

Group Attendance

Ticket Type

Classical Knowledge

First Timers (child)

Pre-performance Preparation

Fulfillment

3 REPORT MODE

☒ By Survey☐ All Together[download xlsx \(BETA\)](#)

Select your options above

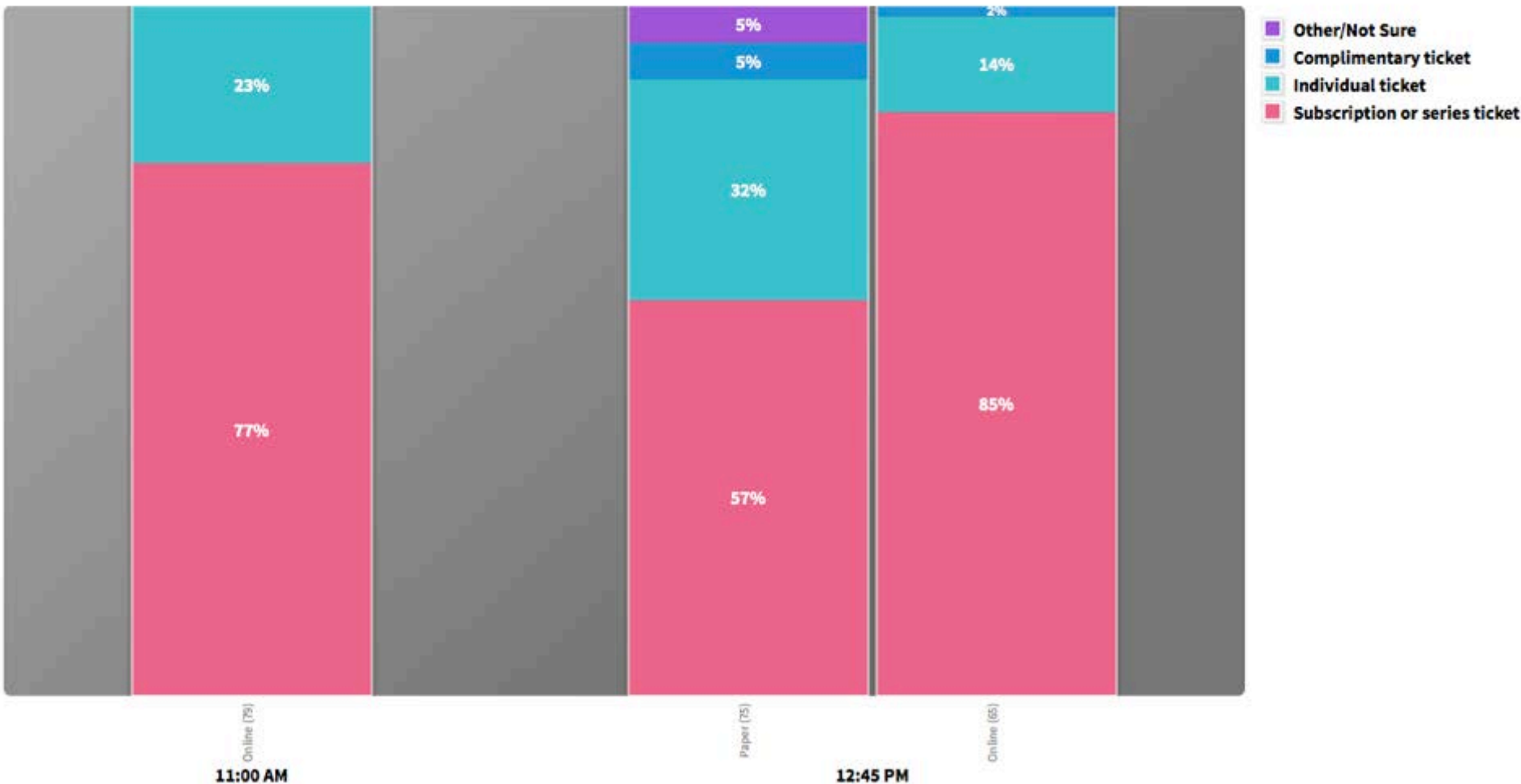
[click here to download this report in Excel format.](#)

Jump to:

[Anticipation](#)[Anticipation Source](#)[Captivation](#)[Friends](#)[Balance](#)[Guest Artists](#)[Artistic Quality](#)[Expectations](#)[Expectations \(open-ended\)](#)[Strengthen Relationship](#)[Expand Interests](#)

If you had a ticket to today's performance, what type of ticket did you hold?

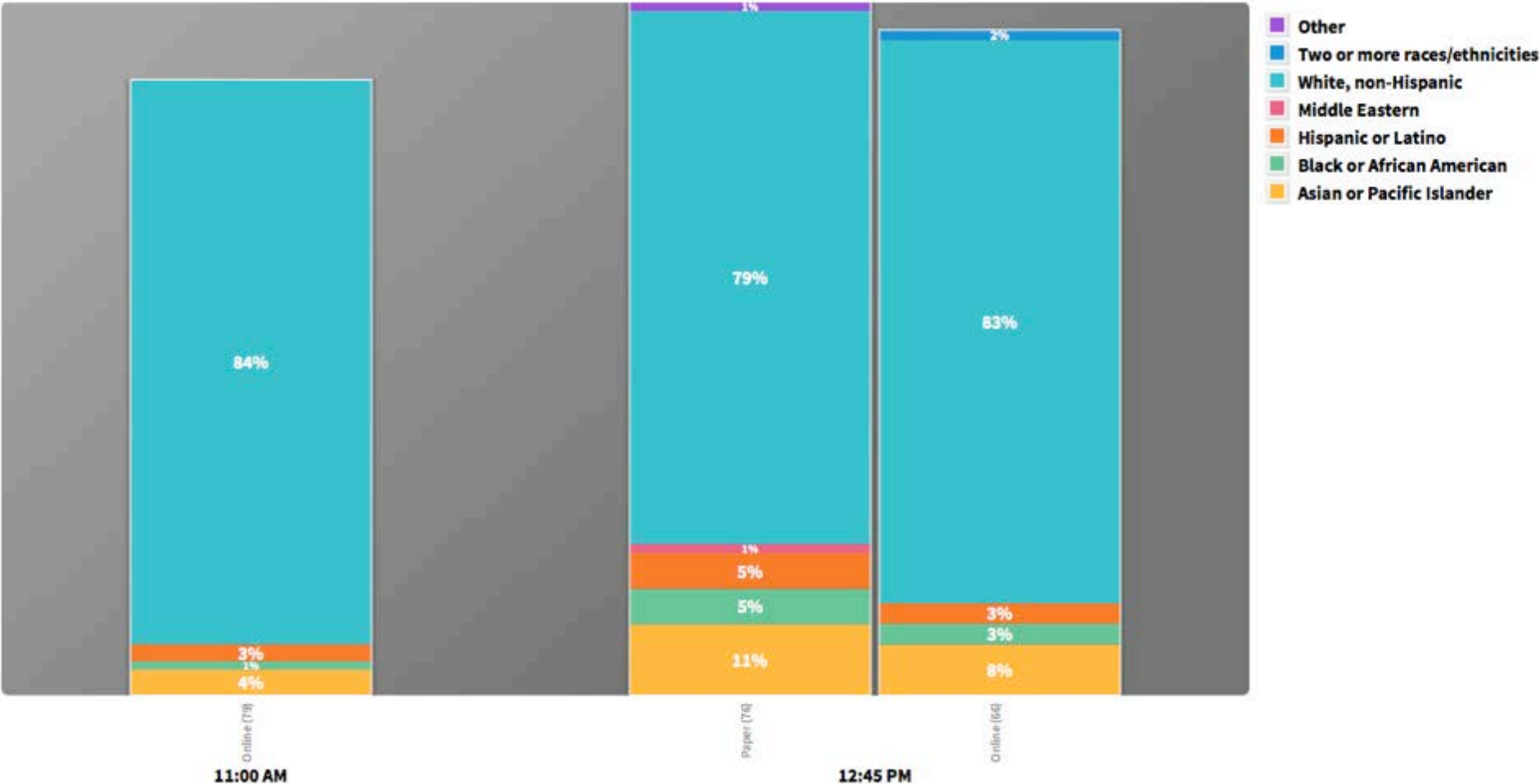
Filter: Performance Time by Method



Which of the following best describes your racial/ethnic background? (select multiple)

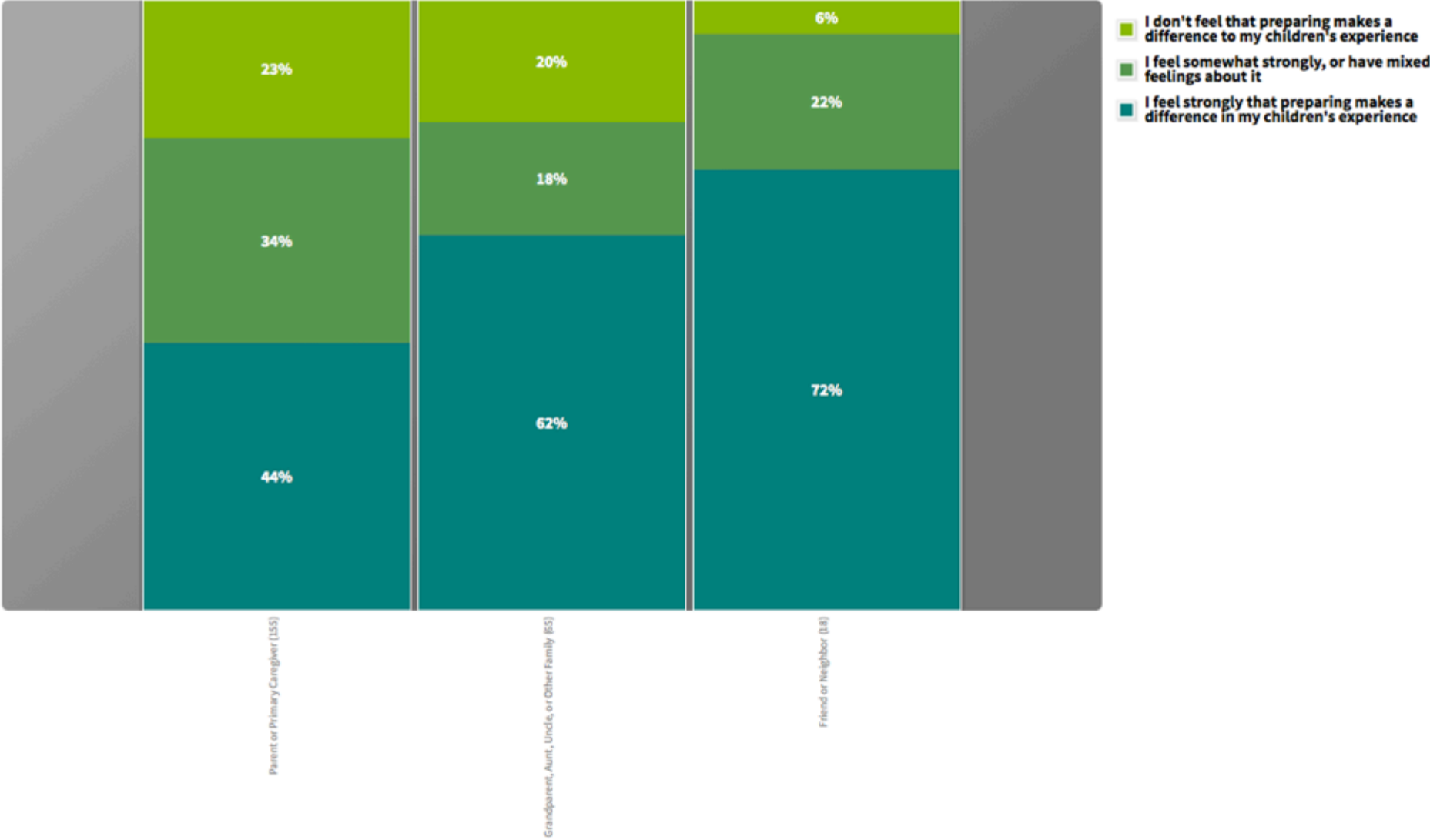
Filter: Performance Time by Method

Note: columns on 'select multiple' questions will not total 100%.



In general, how do you feel about doing preparatory activities with your child(ren), either at home or at Symphony Center, in order to enhance their experience at concerts?

Filter: Relationship to Children



Are there any specific reasons why you didn't engage in any pre-concert activities with your child(ren)? Is there anything the CSO could've done to make it easier?

prev next 1 2 3 4 5 6 ... 8

series_title

[all]

filter_title

Parent or Primary Caregiver

tag_title

[all]

Family Matinee: Adventures with Aladdin Parent or Primary Caregiver

Normally, we do some of the arcade activities. It would be helpful to have a link to the information in the program or the visiting artistic troupe (Lookingglass in this case).

Family Matinee: Adventures with Aladdin Parent or Primary Caregiver

Lack of time and organization

Family Matinee: Adventures with Aladdin Parent or Primary Caregiver

I wish I would have had time to read about the story in advance and go over it with the kids. With all the school work, I barely get them to the concert. I would LOVE a pre-concert activity of "This is what you will be seeing today".

Family Matinee: Adventures with Aladdin Parent or Primary Caregiver

Mostly limited time and attention span.

Family Matinee: Adventures with Aladdin Parent or Primary Caregiver

We used to go to all the pre concert activities. the 11 year old is too old but we do go when we take the younger children,

Family Matinee: Adventures with Aladdin Parent or Primary Caregiver

We have a very busy schedule with sports and other family obligations. Since she is 10, she is able to read the program at the concert and get a lot out of it. It seems like pre-concert activities are more important for younger kids.

Family Matinee: Adventures with Aladdin Parent or Primary Caregiver

didn't make it in time

Family Matinee: Adventures with Aladdin Parent or Primary Caregiver

Time. Busy for kids.

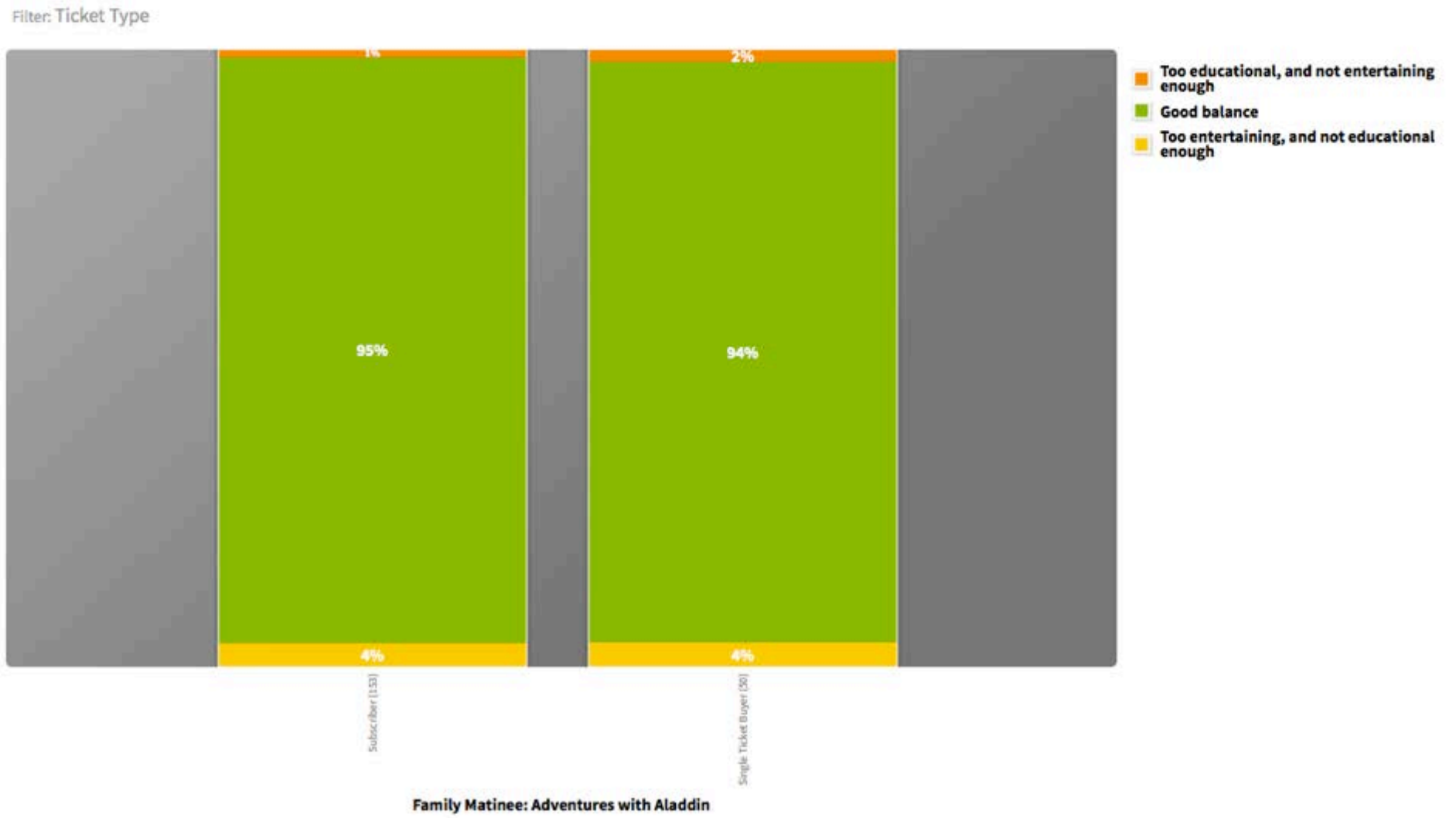
Family Matinee: Adventures with Aladdin Parent or Primary Caregiver

We talk about it before the concert starts and most of our engaging occurs post-concert.

Family Matinee: Adventures with Aladdin Parent or Primary Caregiver

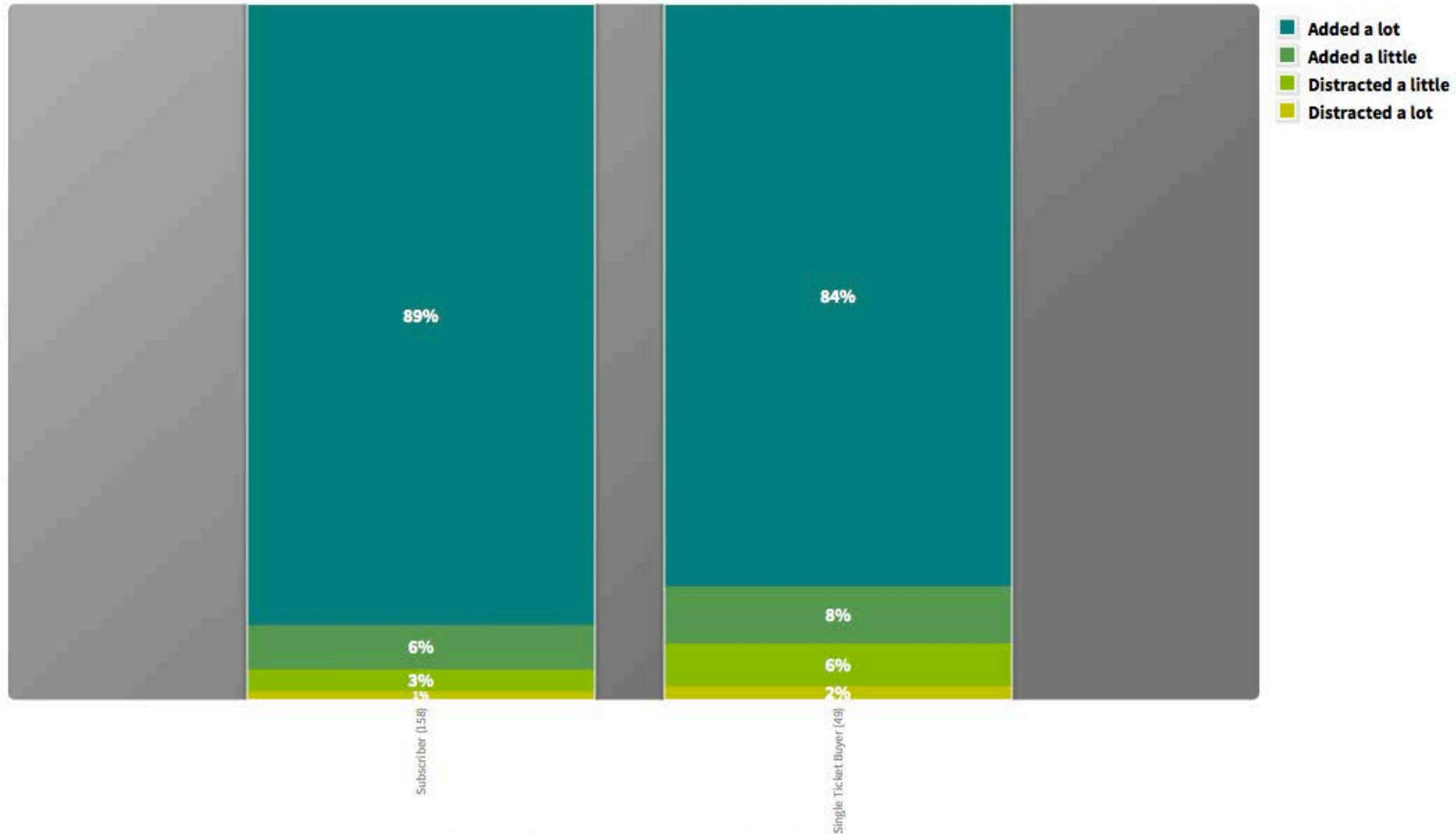
Yeah, an email with ideas about the concert before the concert.

With its family concerts, the CSO strives to strike a balance between programs that are fun/entertaining and programs that are educational. How did we do for this program?



In your opinion, how much did the guest artists distract from, or add to, the overall value of the concert experience?

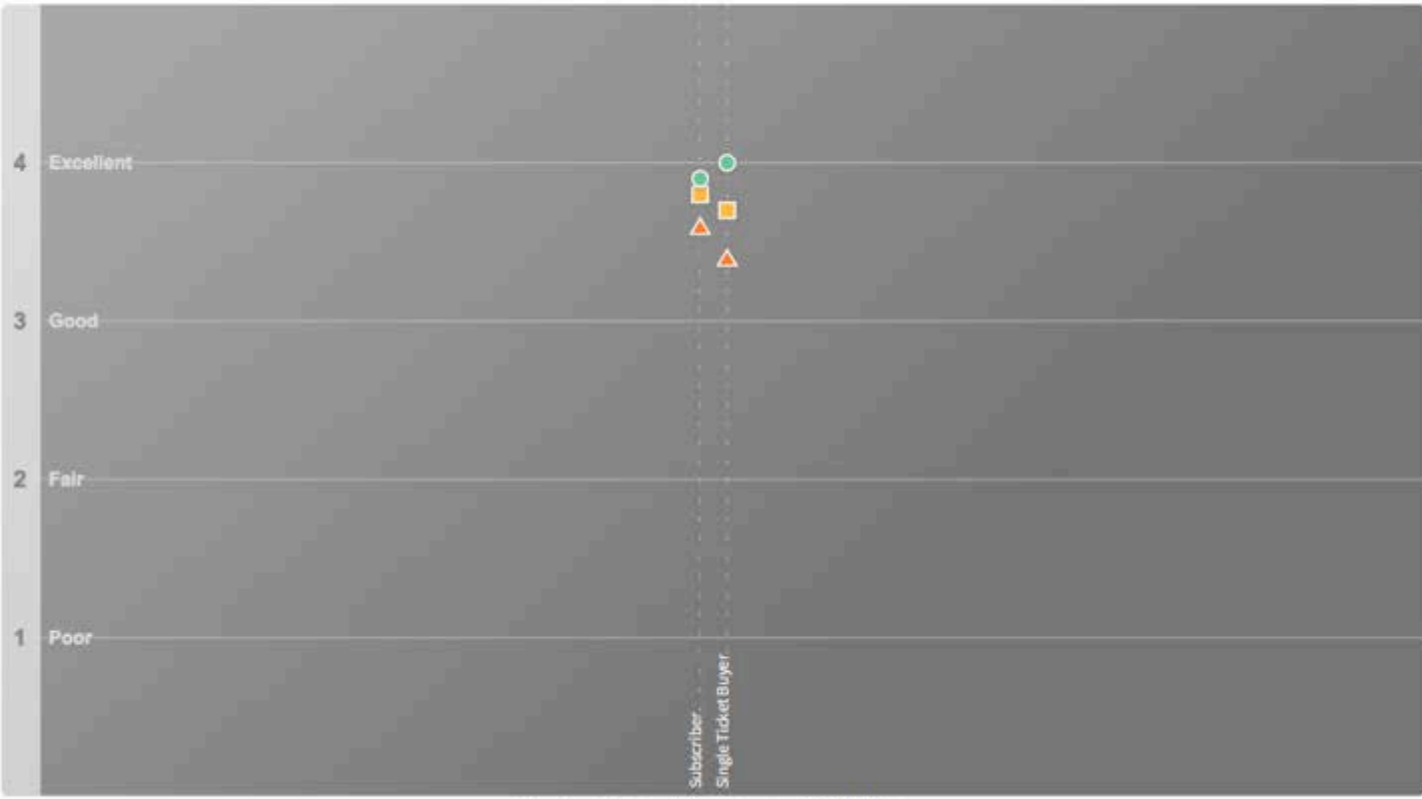
Filter: Ticket Type



Family Matinee: Adventures with Aladdin

Artistic Quality

Filter: Ticket Type



Family Matinee: Adventures with Aladdin

- Quality of the design of the artistic program — how well conceived was this program in terms of the selection of pieces, educational content, etc.?
- Quality of the music making by the conductor and musicians of the CSO
- Quality of support you received from the CSO in maximizing the impact of the program for your children



3. Data Partnership with Marketing

The Inquiry:

What do know about loyalty across various family series?

What does that suggest about long-term engagement?



Marketing Partnership Goals

- Understand existing loyalty across programs
- Develop broader understanding of program impact and importance of sequential programs
- Leverage expertise of colleagues outside the Institute
- Engage colleagues' critical and creative thinking about issues that are important to both departments



Once Upon a Symphony®



CSO
FAMILY
Matinee
SERIES

Metrics

- Total number of unique OUAS households
- Total number of patrons for whom OUAS was their first ticket purchase
- Number or percentage of households that have subsequently attended and/or subscribed to Family Matinee concerts
- Number or percentage of patrons that have subsequently attended and/or subscribed to other product lines



Key Findings - OUAS

1,562 total unique households have purchased OUAS tickets

722 New To File (46%). Of these households, 32% have gone on to purchase tickets in Family or other product lines.

840 With Prior History (54%). Of these households, 79% have gone on to purchase tickets in Family or other product lines.

180 bought Family
after attending
OUAS (25%)

54 additional
households bought
into another CSO
product line (8%)

250 bought Family
after attending
OUAS (30%)

415 additional
households bought
into another CSO
product line (49%)

66
subscribed to
a Family
series (37%)

114
purchased
single tickets
to a Family
concert
(63%)

3 subscribed
to another
series (6%)

51 bought
single tickets
to another
series (94%)

134
subscribed to
a Family
Series (54%)

116
purchased
single tickets
to a Family
concert
(46%)

176
subscribed to
another
series (42%)

239 bought
single tickets
to another
series (58%)



Metrics

- Percentage of patrons for whom FMS is their first ticket purchase
- Percentage of FMS households that are subscribers vs. single ticket buyers
- Average duration of engagement with the Family Matinee Series
- Where do these patrons go when they stop attending FMS?



Key Findings – Family Matinee Series

Season	Total Households that attended a CSO Family Concert	Subscribe to the Family Matinee Series	Buy single tickets to the Family Matinee Series (with previous purchase history)	New-to-File buyers of Family Matinee Series (No previous purchase history)
2011/12	1352	742 (55%)	338 (25%)	272 (20%)
2012/13	1453	704 (48%)	389 (27%)	360 (25%)
2013/14	1526	700 (46%)	522 (34%)	304 (20%)



Questions

- Percentage of patrons for whom FMS is their first ticket purchase
- Percentage of FMS households that are subscribers vs. single ticket buyers
- Average duration of engagement with the Family Matinee Series – **INCOMPLETE DATA**
- Where do these patrons go when they stop attending FMS? – **INCOMPLETE DATA**



Key Findings – Family Matinee Series

Season	Total Households that attended a CSO Family Concert	Subscribe to another CSO/SCP series	Buy single tickets to another CSO/SCP concert	Only buy Family concerts
2011/12	1352	217 (16%)	455 (34%)	680 (50%)
2012/13	1453	241 (16%)	463 (32%)	750 (52%)
2013/14	1526	251 (16%)	414 (27%)	861 (57%)



Key Findings – Family Matinee Series

Season	Total Households that attended a CSO Family Concert	Subscribe to another CSO/SCP series	Buy single tickets to another CSO/SCP concert	Only buy Family concerts
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2013/14	1526	251 (16%)	414 (27%)	861 (57%)

Implications from Marketing Data

- Emphasis on extending engagement in FMS
- Strengthens case for teen program design
- Engages a larger group of staff from multiple departments in inquiry

Actions based on findings

- Increase engagement
- Just-in-time resources to build anticipation
- Compact and portable resources: Spotify, trailers, email invitations
- Ways to make a shared day of it
 - Renewing the pre-concert activities so there is always a reason to come early and enact the musical content
 - Itinerary for day in downtown: The lake, May picnic in park
- Curating the concerts for their **musical** content
- Building out the experience for older ages

Conclusions

- The importance of inquiry-driven data collection
- The time to interrogate the data for implications
- The will to transform implication to actions

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