

COUNT ME IN: LEVERAGING GENERATIONAL DIFFERENCES TO SUSTAIN
VOLUNTEER ENGAGEMENT

Megan Friedman

Major paper submitted to the faculty of Goucher College in partial

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Abstract

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Degree Candidate: Megan Friedman

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Major Paper Directed by: Robert Wildman, MFA

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Professional nonprofit theaters in the United States risk losing important support if they neglect to change existing approaches to volunteer recruitment, development, and recognition in light of evolving generational attitudes toward labor, time-use, and volunteerism. An analysis of data from US federal agencies; arts service organizations; professional associations; the academic and popular literature; and interviews with nonprofit theater shows that generational attitudes toward volunteerism may significantly impact future volunteer engagement, affecting the ability of theaters to continue to offer programming at current levels of quality. New and generationally appropriate ways of seeking, recording, and recognizing volunteer engagement are illustrated.

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Readers' Committee

Robert Wildman, MFA, Chair

Ramona Baker, MFA

Kimberly Dimond, MA

Gregory Lucas, MBA

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Introduction

Context for Research

Volunteerism is a critical part of the arts and culture sector. It is widely accepted that nonprofit organizations rely on contributions to do their work; and that contributions may be in the form of either capital or time (Eisner 32; Baumol and Bowen 499). This study addresses contributed time through the lens of generational attitudes toward labor, time-use, and volunteerism with particular attention to how the organizational context of professional nonprofit theaters accommodates, or might accommodate, rising generations of potential voluntary workers. It further challenges theater organizations to state the value of volunteers' contributions in explicitly financial terms.

Volunteers are present at every level of nonprofit theater organizations, from boards of directors; to skilled volunteers working alongside paid staff; to interns, who build scenery, create marketing collateral, and play small roles in musicals and plays. Volunteers are crucial to the sustainability of performing arts organizations (Stotts; Santora; Borenstein; Turner). Beyond the functional duties they perform, by virtue of their presence and dedication, volunteers link the institution with society in a crucial way. "Whether it's board service or ushering... it's important for society for people to give their time" (Stotts). Volunteerism is indeed a critical element of community involvement ("LA County;" Causey; Baker). Without volunteers, professional nonprofit theater organizations would certainly look different. However, the attitudes of today's younger generations are almost certain to force theaters to reimagine how volunteers are sought

and retained over the long term. Indeed, across the nonprofit sector, there is concern that volunteer recruitment and retention has not evolved in a consistently helpful or sustainable way (McCambridge).

The regional theater movement began on the heels of World War II and gained momentum in the 1970s (Rizzo, “Yale;” Weber). From Theater 47 in Dallas, to the Guthrie Theater in Minneapolis, to the Old Globe in San Diego, regional theaters have flourished for over fifty years. Nonprofit service organizations like the Theatre Communications Group, or TCG, were formed to advance the interests of these institutions (“History”). Buildings were rented, bought, and renovated, and new facilities were built to house a growing roster of programs. In 2015, theaters that shared financial data with TCG and had total annual operating expenses between \$5 million and \$10 million used over 15,000 volunteers. About 1,100 of these volunteers were board members (“Membership”). In comparison to the roughly 9,000 paid professional workers in the same data set, which includes both permanent staff and paid freelance workers, in some organizations volunteers outnumber paid workers six to one.

Theaters’ growth relied on concomitant expansion in labor resources, and volunteers initially filled many of the roles needed for theaters to develop. Boards grew in size and board members’ responsibilities were adjusted to support fundraising for capital and operating expenses; more recently, boards have decreased in size, while fundraising obligations remain a significant priority (Thompson). Ushers learned to seat people in not one venue, but two or more. Interns came to be expected to tackle not just filing, but complex marketing and other tasks necessary for theaters to compete in the evolving market for entertainment. Volunteer technicians, never an especially large part

of the volunteer workforce, now enter a backstage with advanced computer-controlled lighting, scenery and sound equipment. The professionalization of staff in administrative, artistic, and technical departments followed, as demand grew for predictable institutional capacity and financial stability (Lober; McCambridge). Despite changes in the corporate culture of theater companies, as well as changes to their organizational structure, programs, and technological environment, the intangible rewards of volunteerism—a sense of identity, networking opportunities, opportunities to give back to one’s community, and learning—remain largely stable (Blais 13). However, if theaters are to continue relying on volunteers, it is important that internal, organizational factors and external demographic and social factors be reflected in how volunteers are engaged and understood.

While theaters, along with other nonprofit organizations, have looked forward to a profusion of retired Baby Boomers to supplement their volunteer ranks, the national data indicate this labor pool may be shifting away from the arts, or away from volunteerism entirely (Zedlewski; Srebro; Bernasek). Simultaneously, the attitudes of two younger American generations, Generation X and the Millennial Generation, toward labor, time-use, and volunteerism are markedly different from the attitudes of Baby Boomers (Taylor; Krantz-Kent and Stewart; Ellis, “How”). Finally, while volunteerism in some contexts, such as religious or social services, has seen net growth over the last twenty-five years, volunteer participation in the context of sports, the arts and cultural field, and hobbies has decreased markedly (Reingold and Nesbit). Finally, typical approaches to volunteer engagement in professional regional theaters, as well as in other nonprofit

organizations, may fall short of modern best practices in talent management, described by Robert Grimm in an interview with *Nonprofit Quarterly* editor, Ruth McCambridge:

[To] get the most out of your paid or unpaid staff, you've got to invest in them. But you've got to have a plan of investment. Part of the problem is a lot of nonprofits suffer from . . . turnover as well as burnout. . . . And an organization that doesn't do a very good job of managing and retaining paid staff is not going to do a good job of managing and retaining volunteers. So you have to see them as together, and one of the practices of organizations that are doing that well is that they have a person who is an important senior person in the organization and is in charge of talent management, paid and unpaid.

With these important challenges and opportunities in mind, the sustainability of nonprofit regional theatres hinges upon changes to voluntary positions in light of evolving attitudes of younger generations toward labor, volunteerism, and time-use.

Definitions and Primary Resources

Volunteers will be considered in terms of generation, using the framework defined by the Pew Research Center (“Demographic Research: Definitions”). In this framework, Baby Boomers are people born between 1946 and 1964; Generation X, born between 1965 and 1980; and the Millennial Generation, or Millennials, born between 1980 and 2000. The Pew Research Center and the author acknowledge these divisions are imprecise. That said, the literature on generational trends, affinities, and motivations conforms sufficiently to these divisions that they are appropriate for this work. It should

be noted that the use of the word Millennial for the group born between 1980 and 2000 is not universally welcome; this generation was originally identified in the media as Generation Y. However, in his 1991 book *Generations*, sociologist Neil Howe introduced the term “Millennials,” which has since been widely adopted in the popular and academic literature (Sanburn). Given this broadly accepted, if imperfect, framework, the current Pew Research Center language will be used throughout this paper.

Researchers agree that the nonprofit professional theater field is at an important juncture due to internal and external factors, ranging from the #MeToo movement, to city- and state-based wage activism, to shifting regulations at the federal and state level (Ono, “Moving;” Turner). Considering the number and variety of nonprofit professional theaters that exist in the United States—and the resulting risk of an overwhelming body of research—four theaters were selected for study, supplemented by secondary research. These theaters meet certain criteria. First, they have been in operation for two or more consecutive decades, with stable annual operating expenses between \$5 million and \$10 million, aligning with TCG Budget Group 5 (“Theatre Profiles: Glossary”). This organizational maturity is important, as it implies stable operations and programming and, to some degree, stable leadership and staffing. Second, these theaters produce an annual season of fully-realized productions in a single city or metropolitan area; none of them are summer stocks or touring companies, which have distinguishing seasonal fluctuations in labor needs. All are freestanding businesses; none have an operating agreement with a university or other parent organization. They are also fully professional, featuring artists with advanced training and extensive professional credits. While each organization has meaningful ties to the community, they are certainly not community

theaters in the colloquial sense. Their principal concern is quality theater as evident in their respective missions, rather than community self-actualization.¹ Finally, all four theaters are helmed by experienced executives, who graciously agreed to share their time and insights for this research. These four theaters are the Hartford Stage Company in Hartford, Connecticut, led by Managing Director Michael Stotts; the Long Wharf Theatre in New Haven, Connecticut, led by Managing Director Joshua Borenstein; the Pasadena Playhouse in Pasadena, California, led by Executive Producing Artistic Director Danny Feldman; and TheatreWorks in Palo Alto, California, led by Managing Director Phil Santora.

These executives possess over ninety years of combined leadership experience in regionally or nationally recognized American theaters. At the time of this writing, Stotts has been the Managing Director of the Hartford Stage Company for over twelve years, overseeing an extensive capital renovation and expansion; multiple transfers of new plays and musicals to Broadway and Off-Broadway; the transition from past Artistic Director Michael Wilson to present Artistic Director Darko Tresnjak; and the acquisition of the Hartford Children's Theatre, integrating education programs that serve over 19,000 students annually into the Hartford Stage Company's programming. Prior to leading the Hartford Stage Company, Stotts was Managing Director of the Long Wharf Theatre in New Haven, and held the same role at the George Street Playhouse in New Brunswick, New Jersey and the Shakespeare Theatre in Madison, New Jersey. In addition, he has served or currently serves on the boards of several performing arts and community-based

¹ For a discussion of community theater, its influences and intents, see "From the Top: History of community theatre in America," by Dr. Twink Lynch of the American Association of Community Theatre, at www.aact.org/community-theatre-history.

nonprofits and has received awards from the Connecticut Commission on Culture and Tourism for his advocacy for the arts (“Our Leaders”).

Joshua Borenstein, in his seventh year at the Long Wharf Theatre at the time of this writing, has overseen a successful capital campaign and extensive renovation of the Claire Tow Stage; supported the development of numerous original productions; and overseen extensive operational and staffing changes at the Long Wharf Theatre (Rizzo, “Joshua Borenstein”). Prior to joining the Long Wharf Theatre, Borenstein held leadership roles at the Yale Repertory Theatre in New Haven, Trinity Repertory Theatre in Providence, Rhode Island, and the Huntington Theatre Company in Boston, as well as at AMS Planning and Research, an arts consultancy in Southport, Connecticut.

Phil Santora of Theatreworks has been the managing director of the company since 2007, eleven years as of this writing, overseeing numerous premieres of plays and musicals. He will soon lead the organization through its first transition to a new artistic director, as founding Artistic Director Robert Kelley prepares for retirement following the company’s fiftieth season (Santora). Prior to his engagement with Theatreworks, Santora held leadership roles at the Northlight Theatre in Chicago, the Georgia Shakespeare Festival in Atlanta, and the George Street Playhouse (“Staff Directory”). He is a board officer of the National Alliance for Musical Theatre and has served on the boards of regional and national service organizations, receiving awards from *Atlanta Magazine* and the Atlanta Arts and Business Council for his accomplishments.

Danny Feldman has served as the Producing Artistic Director of the Pasadena Playhouse since late 2016, following executive leadership roles at Reprise! in Los Angeles and the Labyrinth Theatre Company in New York City. Feldman’s charge upon

joining the Pasadena Playhouse has been to continue providing, or develop new approaches to, stabilization efforts for an organization with more than 100 years of history in the community, and which is designated the state theatre of California (Fung). Among his priorities has been an assessment of how the volunteer guild, a passionate group of donors and advocates, can continue to support the organization in light of changing local demographics and evolving organizational goals (Feldman).

Complementing the perspectives of these leaders, three additional primary sources provide context for this study. Lynette Turner, a Senior Associate at AMS Planning and Research, has held executive roles at the Perseverance Theatre in Juneau, Alaska and elsewhere (Turner). As of this writing, she is facilitating the creation of a strategic plan for the Guthrie Theater in Minneapolis. Past projects include research and organizational evaluation for clients such as the Theatre for a New Audience in New York; the DanceMotion program run by the US Department of State in partnership with the Brooklyn Academy of Music; and Theatre Communications Group (“Lynette Turner”). Sara Leonard provided insight into performing arts attendance and emerging research based on her analysis of the National Endowment for the Arts’ Survey of Public Participation in the Arts. She is a co-author of the 2015 report, *When Going Gets Tough: Barriers and Motivations Affecting Arts Attendance*, commissioned by the National Endowment for the Arts (“Sara Leonard Consulting”). Finally, Terry Delavan shared her time and insight. She is the immediate past board chair of CAVORT, the Conference About Volunteers of Regional Theatre, as well as a long-time volunteer at the Syracuse Stage in New York. In the course of her career volunteering for Syracuse Stage and CAVORT, she has gained insights into the opportunities and challenges facing theater

volunteers from San Diego to Minneapolis to Louisville and shared these findings with appreciated candor (Delavan).

All of these experts agree on the importance of volunteers' efforts to the work of nonprofit theaters, both professional and amateur. However, there is little agreement on whether and how such efforts could be valued in explicit terms. Independent Sector provides a useful approach, using the following methodology:

The value of volunteer time is based on the hourly earnings (approximated from yearly values) of all production and non-supervisory workers on private non-farm payrolls average (based on yearly earning provided by the Bureau of Labor Statistics) for the national average. Independent Sector indexes this figure to determine state values and increases it by 12 percent to estimate for fringe benefits. ("Value")

On this basis, volunteers' time can be valued in dollars, consistent with other types of gifts nonprofits typically receive. An exercise using this approach is included in a later section of this paper, using the national estimate of the value of volunteers' time in 2016, the latest year for which such a calculation is available.

Finally, two important groups of volunteers are considered as parts of the whole, rather than discrete units: board members and interns. Board membership is recognized as a unique mode of volunteer engagement and is the subject of extensive study at the industry and organizational level (*Leading with Intent*). Nevertheless, board members are, legally, volunteers first. They may be, and often are, donors, advocates, ticket-buyers, and more; however, the core relationship of a board member to a given nonprofit theater company, or any nonprofit entity, is that of a volunteer. In regard to volunteer interns,

while the legal and ethical dimensions of unpaid internships merit in-depth discussion, the purpose of this paper is to explore volunteerism, broadly defined (Ostendorf-Rupp; Frenette). Exploring the unique issues surrounding unpaid internships in the arts, though important to the field, is not at the heart of this paper.

Chapter I THEATER VOLUNTEERS—UNIQUE STAKEHOLDERS IN AN EVOLVING FIELD

Arts Volunteers Have Unique Motivations

Theater audiences provide a useful lens for this study; research suggests similarities in audiences' and volunteers' motivations and demographics. A study of volunteerism in Los Angeles County arts nonprofits found that, among more than 360 organizations surveyed through DataArts, the largest contribution in terms of volunteer hours was to theaters, even though multidisciplinary organizations had more volunteers in total ("LA County"). The same study emphasized another distinction separating arts volunteers from those who give their time to non-arts organizations, noting:

In the arts, however, people often volunteer because they want to participate in the creation of an art, or to have special access to the artists and their artworks. As such, the motivations of arts volunteers are very similar to those of visitors and audience members. In arts nonprofits, volunteer work may not simply be a tool for achieving mission, but may actually be fulfillment of the mission itself. Arts nonprofits should consider integrating their volunteers into their public engagement plan. (3)

Playing on desires to participate in art-making itself may be the key to activating theater volunteers. This desire is also referenced in another, earlier report, focusing not on

arts audiences but on students who earn Baccalaureate degrees in the arts. This report, *Painting with Broader Strokes: Reassessing the Value of An Arts Degree*, found that while people who earn undergraduate degrees in arts fields may seek career paths in other fields, they are more likely than the general public to volunteer for arts organizations. In this group of respondents with arts degrees, 31% of people volunteer, in contrast to the approximately 25% of people who volunteer in the general American public (Lindemann et al. 17). In addition, about 43% of arts alumni who work in an arts-related field also volunteer for an arts organization (Lindemann et al. 17). Among theater alumni, the rate of volunteerism is a remarkable 50%, regardless of current professional affiliation with the arts (Lindemann et al. 18). In light of the willingness of arts alumni to volunteer for arts organizations—often in their field of study, and especially in theater—nonprofit professional theaters may benefit from conceiving of these potential volunteers as a special audience segment (Lindemann et al. 21). Notably, none of the interviews conducted during the research process for this paper indicated that volunteer recruitment was focused on cultivating the artistic inclinations of volunteers themselves, or that cultivating volunteerism among arts graduates was a strategic priority (Borenstein; Stotts; Feldman; Santora). Secondary research, however, makes clear that the unique motivations of arts volunteers—a desire to be actively involved in art-making—are aligned with emerging notions of broader audience motivations and preferences.

Theater Volunteers and Evolving Notions of Engagement

The definition of engagement in the arts has changed in recent years. While many professional regional theaters have tended to model programming and audience engagement on nineteenth- or early twentieth-century performance styles, modern audiences have shown interest in more participatory ways of engaging in the performing arts. Ann Markusen and Alan Brown observed in 2014 that “many arts lovers are asking for more opportunities to engage with accomplished artists and arts performances.” They “[aspire] to co-author meaning,” gravitating toward performances, exhibits, and other arts events that foster interaction with the artwork (Markusen and Brown). Markusen and Brown further note that, often, the older conventions surrounding theatrical performances, art exhibits, and other public events contraindicate interaction between attendees and art-makers, eliminating the chance to interact before attendees can make an attempt to co-author their own experience. The very architecture of many theaters, for example, discourages interaction between attendees and performers.

As the desire to “co-author meaning,” or actively participate in interpreting and shaping an experience, has grown in relation to performance programming, it has also grown in relation to volunteer engagement at nonprofit professional theaters, although there may be opportunities for further expansion. Stuffing envelopes and sorting files, while still periodically necessary, does not offer the volunteer any creative influence, or even the opportunity to be a spectator. Board or advisory council service, however, offers a measure of creative influence in addition to satisfying the wish to be of service to one’s community. However, there are as-yet unexploited opportunities to integrate volunteers

into the public engagement strategies of arts organizations, including theaters, as thoroughly documented by the Los Angeles County Arts Commission in the *LA County Arts Report: Volunteers in Nonprofit Arts Organizations in LA County – Analysis of Data from the Cultural Data Project*.² In addition, some large professional nonprofit theaters have begun engaging volunteer workers precisely for their creative input, in programs modeled on the Public Works³ program originally piloted by the Public Theater in New York City (Wilson).

Alongside this increase in the desire for creative control among audiences and attendees, arts participation trends reflect an increasingly diverse universe of consumers, with diverse needs and motivations (Blume-Kohout and Leonard). This is reinforced by reports from the market intelligence firm Nielsen, assessing broad and distinguishing consumer preferences among Millennial, Generation X, and Boomer populations (Hale; “Multicultural Millennials”).

In tandem with changing notions of engagement in the arts, recent scholarship has challenged nonprofit organizations and public agencies to govern generatively (Chait et al.; Turner). In a 2004 publication for BoardSource, Richard P. Chait, William P. Ryan, and Barbara E. Taylor posit that generative governance is one of three important modes of governance in which a nonprofit board engages regularly. The three modes are the fiduciary, where boards address management of tangible assets, clear faithfulness to the mission, and compliance with legal and other operating regulations; the strategic, where

² This report was issued prior to the rebranding of the Cultural Data Project as DataArts.

³ Public Works is “a major initiative of The Public Theater that seeks to engage the people of New York by making them creators and not just spectators.” For more information, see www.publictheater.org.

boards establish organizational goals in collaboration with management, deploying resources in accordance with an agreed-upon course of action; and the generative, where the board and executives “frame problems and make sense of ambiguous situations—which in turn shapes the organization’s strategies, plans, and decisions” (Chait et al.).

While the first two modes can, and in some cases do, sufficiently protect nonprofit organizations from legal and financial risk while advancing the organizational mission, the generative mode is considered by Chait and his colleagues to be the essence of good governance. In describing “the power of framing,” Chait, Williams, and Taylor arrive at much the same conclusion as Markusen and Brown, where co-authorship is central to the activity of arts participants. People who volunteer for theaters, therefore, whether in the boardroom, the office, the lobby, or elsewhere, can be presumed to have a desire to be the authors of their own experience, as theaters’ audiences do. Providing outlets for manifesting participatory opportunities is critical to theaters’ continued success and sustainability. To be most effective, these outlets should align with the unique values of the desired volunteer populations. As rising generations exhibit distinct attitudes toward labor, volunteerism, and time-use, the values these behaviors reflect should be integrated into how volunteer tasks at nonprofit theaters are conceived, communicated, assigned, and recognized.

Chapter II DRAMATIC CHANGES IN THE VOLUNTARY WORKFORCE

Millennials More Racially Diverse Than Previous American Generations

Millennials as a national cohort are more racially diverse than any previous American generation. According to a Brookings Institution examination of the 2015 Census data, about 55.8% of Millennials are White, compared to 75% of Baby Boomers. Generation X and the youngest Baby Boomers, ages thirty-five to fifty-four in the Brookings study, reflect the national racial composition with a distribution that is 61.5% White, 17.6% Hispanic, and 12.5% Black. Peering into the future, author William H. Frey notes that among “persons now under 18 . . . Whites comprise just over half (51.5%) of this generation. Of this subset, people between ages one through five are minority white.” In the following section, the research will show that volunteering tends to correlate with race. Historically, White persons have been the most likely racial group to volunteer (“Volunteering”). Thus, the racial diversity of the Millennial Generation may be a factor in decreasing rates of volunteerism. This is not at all to suggest that persons of color are uninterested in volunteering. It is to recognize that existing volunteer opportunities in the arts may simply not resonate with populations of color in rising generations—a considerable, and surmountable, challenge to theaters wishing to tap into the volunteer labor of younger generations in the years to come.

In order to understand their exposure to decreased volunteer interest on the basis of these data, theaters may wish to begin documenting the racial demographics of current volunteers. This information would allow theater executives to consider present volunteer

trends at their respective institutions, in light of the current and projected future demographics of their organizations' local population.

Volunteerism: Demographics, Life Stage, and Life Expectations

National data reveal distinguishing generational attitudes toward volunteerism and labor, tied to when people tend to achieve life stage milestones such as retirement, marriage, and the birth of a first child. Broadly, volunteerism correlates positively with educational achievement and income, and women tend to volunteer more often and for more hours than men (Reingold and Nesbit). As the general population of the United States increasingly hold a Baccalaureate degree or higher, the correlation with educational attainment might drive rising rates of volunteerism. However, there is speculation that growing income inequality will cancel this effect, as educated adults of all ages must allocate ever-larger amounts of their time to wage-earning activity or family caretaker roles rather than volunteerism (Leonard). In addition, as women's labor force participation increases by a significant margin in each generation, the tendency of women to give a majority of volunteer days and hours may shift (Leonard; Reingold and Nesbit).

In terms of racial demographics, people identified as non-Hispanic White tend to volunteer at the highest rates across all other demographics, at a rate of 26.4% based on data from 2015 ("Volunteering"). Data from the same year indicates Black people volunteering at a rate of 19.3%; Asian people at a rate of 17.9%; and people of Hispanic descent at a rate of 15.5%. When compared to data from 2011, included in the same 2016 report by the US Bureau of Labor Statistics, the only racial demographic in which

volunteer rates increased was the group identifying as Hispanic or of Hispanic descent, which rose from 14.9% to 15.5% in this five-year window. All other racial groups saw a decline in the volunteer rate of at least 1%, with the steepest decline among Asian people, whose volunteer participation rate dropped by 2.1%.

Audience and employment trend data may shed light on the likely demography of theater volunteers, which can then be considered in light of the trends described above. A 2017 study conducted by the Actors' Equity Association, the union for professional actors and stage managers in the United States, found that a disproportionate majority of labor contracts go to White union members (Paulson). Bearing in mind that the motivation of both arts volunteers and arts professionals is to be involved in art, it can be inferred that the two groups share additional characteristics including racial composition. Anecdotally, concern that theaters have disproportionately White workforces is shared by the staff at nonprofit theaters and by researchers (Stotts; Feldman; Turner; Leonard). This is further supported by a 2015 study in the *GIA Reader* that found 78% of arts managers identify as White (Cuyler). If the paid administrative workforce of arts organizations overwhelmingly identifies as one race, it is likely that volunteers at nonprofit arts organizations, theaters included, reflect the same pattern. The final and most compelling proxy for theater volunteer demographics is the largest group: theater audiences. According to the National Endowment for the Arts' research report *A Decade of Arts Engagement: Findings from the Survey of Public Participation in the Arts*, just over 80% of audiences attending either musical or non-musical plays were White in 2012. This is sharply out of proportion to the general US population, which in 2012 was 66.3% White according to the Census data. Three studies, therefore—of freelance theater artists, paid

administrative staff, and theater attendees—reflect a disproportionately White nonprofit theater sector. Using all of these studies as a proxy, one may infer that a disproportionate number of theater volunteers are also White.

With these demographic factors in mind, changes along generational lines may force professional nonprofit theaters to adjust their approach to volunteerism. The shift to a majority-minority nation suggests that, as early as the 2040s, cities and states across the United States will see a shift to non-White majorities—if they have not already observed this change (Cooper). If nonprofit professional theater organizations’ paid workforce and audiences reflect a shrinking, predominantly White demographic and cultural orientation, then the organizations themselves may shrink over time or be challenged to change their functional makeup to reflect the ever-more racially diverse communities in which they operate.

Volunteer Participation is Decreasing

The national data may hide decreasing volunteer participation in the arts and culture sector. A 2006 study produced by the Corporation for National Community Service cited a 30-year high in volunteerism, with 27% of adults in the US giving their time in some fashion (Reingold and Nesbit). There were increases in volunteerism noted among older teenagers, now included in the Millennial Generation; mid-life adults; and adults sixty-five years of age and older. However, the distribution of volunteers by industry reveals that education and social service organizations enjoyed the greatest gains, while volunteerism at arts and culture organizations, religious organizations, and

civic, political, professional, and international organizations dropped (Reingold and Nesbit). Episodic volunteering, defined as contributing ninety-nine or fewer hours to a single cause in a year, increased markedly among people who were teenagers at the time of the study, and among adults ages forty-five to sixty-four (Reingold and Nesbit). More recently, a series of studies published in 2014 found the percentage of respondents who said they volunteered at all is dropping. Despite the fact that a lower percentage of people in the US are volunteering, the aggregate number of hours volunteered remained steady from 2006 to 2013 (Clolery). These combined data suggest that while fewer people are volunteering, those who do volunteer are giving a greater number of their hours to the chosen cause.

These national data suggest that younger people and working-age people are willing and able to volunteer, and that episodic volunteer engagement is their preference (Reingold and Nesbit). These trends suggest that episodic, time-limited volunteer opportunities may be more desirable than regularly occurring opportunities without a clear end date. An episodic volunteer opportunity that requires a commitment of several consecutive days may be more enticing than one requiring regular attendance for a year, even though these two offerings may represent the same number of hours. The appeal of episodic volunteering is that it provides the volunteer with deep engagement in a specific task or event, while relieving him or her of planning around regular commitments. For example, a volunteer may wish to be in charge of a theater company's booth at a conference for four days, totaling thirty or more hours of work. However, the same volunteer may be reluctant to commit to monthly meetings of an advisory council, even though this commitment would require about the same number of hours in a year. The

festival booth commitment may require this volunteer to use a vacation day or holiday, however during this time she can immerse herself fully in the experience. Monthly meetings, in contrast, create a commitment that may reduce her time at home, compromising time with her family; force her to miss work or modify her work hours, compromising her professional commitments; or otherwise make the volunteer feel burdened by additional work rather than fulfilled by engaging with art.

These data are tied to the influence of life stage, rather than simply age, upon the decision to volunteer (Reingold and Nesbit; Borenstein). Childbearing and marriage in particular influence where, when, and whether working-age adults volunteer. As the average age of marriage and childbearing increases in the United States, the typical age and level of interest of volunteers may also increase (Chase; Carlson). Research has documented a correlation between the age of parents when their children leave home, presumably for college or to establish independent households, and substantially increased volunteer participation by the parents themselves (Reingold and Nesbit). Much has been made of how the mass retirement of the Baby Boomers will flood volunteer rosters across the nonprofit sector, however shifting expectations due to economic volatility have dampened pundits' enthusiasm (Zedlewski).

A 2013 study commissioned by the Associated Press-NORC Center for Public Affairs Research found that many adults ages fifty and older plan to work for pay during their retirement, if they are not retired and employed at least part-time already (Benz). With younger Boomers seriously impacted by the Great Recession, this study also revealed the average age of retirement has shifted from age fifty-seven among people who retired before the financial crash in 2008-2010, to age sixty-two among those who

retired after the recession began. These findings suggest that the leisure time of older Americans may be shrinking—at least, the leisure time that would otherwise be spent volunteering.

Chapter III GENERATIONAL DIFFERENCES INFORM VOLUNTEERISM

Gaps in Volunteer Availability for Generation Xers and Millennials

Generation Xers differ markedly from Baby Boomers in terms of their expectations surrounding labor and time-use. Rather than associating success with ascension of a vertical workplace hierarchy, Gen Xers “value skills over long hours,” seeking validation and satisfaction through meaningful effort rather than traditional markers of prestige (Ono, “What”). Although Generation X is smaller in number than either Boomers or Millennials, it is members of this generation—entering or well into their 40s at the time of this writing, and as a group possessed of substantial professional and academic credentials—who are rapidly entering the ranks of executive staff and governance roles as Baby Boomers contemplate or enter retirement. Generation X occupies a particularly tenuous place in terms of family and care-taking time use, as well; in a 2014 article in *Time* magazine, Generation X is identified as the first generation “bearing the burden of raising young children while also managing aging parents” (LaMotte). This indicates that, regardless of the desire to volunteer among Generation Xers, a significant portion of this generation may have more pressing demands on its time. Finding and preserving ways for Gen Xers to be involved with nonprofit professional theaters, without compromising their care-taking obligations, will be important to retaining their interest over the long term (LaMotte; Borenstein). Generation

X also marked the beginning of a socially and economically significant shift between the sexes, with more women than men graduating from college (Carlson). Women have historically been more likely to volunteer than men, regardless of their other demographic characteristics; as women are increasingly highly educated, they may be less interested in volunteering for mundane activities, preferring to volunteer in leadership roles (“Volunteering;” Reingold and Nesbit). Further, as Generation X women have invested more time in their formal education and career advancement than Boomer women—and Gen X men, for that matter—the share of time they can invest in volunteering may be limited, due to career obligations and a desire to focus on income-generating activities.

In contrast to Generation X, Millennials demonstrate great concern for work-life balance, fighting against long hours in the workplace in the interest of finding validation and inspiration in other settings (Ono, “What”). Millennials are likely to be the first generation in the United States that sees the minority-majority predictions bear fruit during their prime working years. More likely than older generations to align even modest cash and labor contributions with personally important political and social causes, the 2015 *Millennial Impact Report* notes that 70% of Millennial employees spent at least an hour volunteering in the previous year, and that 45% of survey respondents spent at least some of their volunteer time on a cause that was either offered or promoted by their company. Nearly a third of Millennials, 32%, used paid time off to volunteer, while 16% took unpaid time to volunteer. While 32% of Millennials volunteered on paid time, it is unclear whether their employers designated paid time off specifically for volunteer activity, or the workers themselves scheduled their voluntary commitments during other types of paid time off, such as vacation days.

Millennials entered the workforce while the United States was in the throes of the Great Recession, and the data indicate the weak labor market that prevailed throughout Millennials' early working years will have a lasting effect on their ability to engage in leisure activities or retire before age 70 (Taylor, "Generational"). More than one expert suggests that, with less perceived job security and financial support, as well as the rise in Millennials' participation in the so-called gig economy, Millennials are less likely than either Boomers or Gen Xers to be influenced by employers to volunteer regularly or episodically, because this generation has less exposure to employers than the two older generations (McGuire; Leonard). The rise of the gig economy, and its outsize representation among younger workers, may be a factor underlying experts' speculation. By engaging in gig work rather than full-time, regular employment, Millennials are less likely to be encouraged to volunteer through workplace initiatives or policies. There is further speculation that employers have reined in their encouragement for volunteering, by requiring more rigid work hours or refusing to compensate employees for hours spent in volunteer activity (Delavan). Employers may prefer designated days of service, rather than allowing employees to make ongoing commitments that pose risks to productivity. While Delavan, the past board chair of CAVORT, described past employers' willingness to accommodate volunteer commitments during conventional work hours, Millennial workers in today's corporate environment may be challenged to find the same support. A *National Public Radio* investigation of employer-sponsored volunteerism cited the advantages having an employee volunteer program—where workers are permitted up to sixteen hours annually of paid time for the purpose of volunteering ("More"). This allotment would cover one monthly meeting of one hour and twenty minutes, falling far

short of the time necessary for most board meetings, for example; however, it could accommodate the equivalent of two working days for workers who wish to volunteer on an episodic basis.

These findings, collectively, indicate that rather than a flood of volunteers, there are likely to be noticeable gaps in volunteer availability, especially in fields that are already seeing reduced volunteer participation—including the arts (Reingold and Nesbit). This is reinforced by volunteer recruitment challenges cited at professional nonprofit theaters, as well as at some amateur theaters (Stotts; Feldman; Leonard).

Different Generations Require Unique Volunteer Development Strategies

Each of the three generations under consideration has, in a broad sense, a unique culture of generosity with regard to both financial and voluntary time contributions, which in turn require unique development and retention strategies (Achieve Guidance). Some consultancies and nonprofit resource aggregators even suggest crafting a strategic plan for how a nonprofit will find, train, and retain volunteers of different generations (Page).

According to a 2015 *Forbes* article, generationally distinct motivations to volunteer are significant enough that workplace volunteer programs are urged to take note. Boomers are likely motivated by opportunities to contribute time on short term, specific assignments, and to use special skills—ranging from legal expertise to cooking to driving—to help achieve an important, visible goal. Boomers “prefer to communicate through email, on the phone, or in person” (Scott). Generation X, the most-educated

group with an increasing share of executive and senior management roles, are more likely to volunteer their time for causes that directly impact them (Scott). More nimble in the rapidly evolving technological environment than Boomers, Gen Xers welcome communications spanning email and a variety of other messaging platforms. Millennials, the largest living adult generation in the workforce and facing macroeconomic disadvantages their forebears did not, tend to view volunteering as “their civic duty” (Fry; Scott). Many educated Millennials were urged to volunteer to gain professional experience; it has been speculated that among Millennials, this approach is now viewed with distaste, as it reinforces the notion that the ability to volunteer correlates with having sufficient personal or family wealth to subsidize volunteer work as a substitute for paid labor (Leonard; Frenette).

Volunteer recognition is another area in which each generation has demonstrated unique preferences. The Minnesota Association for Volunteer Administration, or MAVA, a leading statewide association with a mission to “inspire excellence in leadership of volunteers to impact communities,” recommends a range of recognition types that are not simply different, but in some instances direct opposites (Heverly). For Boomers, MAVA encourages awards, public recognition at events or in newsletters, and sincere notes of thanks. For Generation X, MAVA suggests written thanks either in print or through electronic means but discourages public recognition events—while urging volunteer administrators to create opportunities for Generation X volunteers to involve their families. Both Generation X and Boomer volunteers, in MAVA’s view, are likely to prefer individual recognition approaches, rather than group recognition. In contrast, Millennial volunteers are said to prefer recognition that highlights collaboration and is in

“close proximity to what someone is being recognized for” (Heverly). This “proximity” refers to timely recognition, ideally taking place immediately following the volunteer’s efforts. For example, a volunteer who agrees to shuttle visiting performers from a train station to the theater may be most pleased with immediate recognition. This could mean that all the volunteers who drive performers to the theater are also welcomed at the company dinner, where they will meet and mingle with artists and staff.

The utility of this multimodal approach to recognizing volunteers of different generations is confirmed by both long-time volunteer Terry Delavan, of CAVORT, as well as by professional staff and nascent research into volunteer engagement practices (Delavan; Feldman; Minocha). Recognition of volunteers is unlikely to either become uniform, or to remain a fixed process for an extended time. Professional nonprofit theaters seeking an age-diverse volunteer cohort are likely to find greater satisfaction among volunteers if the recognition tools are flexible and account for unique generational preferences. While qualitative data indicate that formal recognition practices tend to reduce volunteer turnover, no publicly available quantitative data substantiate this for the nonprofit professional theater industry (Litch).

For the Millennial generation especially, the Independent Sector approach to valuing volunteer time may support a compelling engagement and retention tactic. Using the Independent Sector rate to indicate the value of volunteer time received, for example in annual reports and volunteer recognition letters, emails, and other materials, would counteract the negative connotations that volunteering may have for Millennials. By explicitly describing the financial value and impact of volunteerism, theaters and other nonprofit organizations may be able to convince this generation that their time is not

being taken for granted—it is, instead, a valuable and valued part of what makes the theaters’ work possible.

Time-Use Expectations and External Factors Affect Volunteer Availability and Interest

Attitudes toward and habits surrounding time-use are a third area in which the three generations of concern differ. These differences in attitude and behavior are, in turn, influenced by employer-driven decisions and distinguishing generational ideals of work-life balance. An incisive assessment of these influences comes from Robert McGuire, former Director of Community Investment at the United Way of Greater New Haven. McGuire is now a freelance professional in the content marketing field and has served on nonprofit boards of various arts and community-focused organizations for over a decade. He notes that it is a “constant battle to have a quorum,” on these boards, citing the heavily over-scheduled individuals who are interested and have the necessary talents and financial acumen to be generative contributors, but lack the ability to dedicate time for board meetings, committee work, fundraising and other responsibilities. McGuire states:

It eventually dawns on you that it won’t get better. The person who’s missing their third board meeting in a row... it’s not like the next quarter they will get [to the meeting]. That macro trend is an accelerating problem. Given that, we need to rethink how our boards work. Rescheduling or going online is just moving the problem a little bit.

In the interview quoted above, McGuire reflects on the challenges wrought on volunteerism, in the context of board service, by growing demands on the time of adults

of all generations. Citing increasingly busy work schedules set forth by employers, coupled with decreasing benefits or support for on-the-clock volunteerism, McGuire proposed a project-based approach to volunteerism, echoing earlier recommendations that episodic volunteerism is more suitable for many of today's volunteers. McGuire's concerns about volunteer availability and time-use was echoed by the staff at nonprofit theaters (Stotts; Santora).

Inextricably tied to time-use is work-life balance, a concern for employers and employees alike (McGuire; Society for Human Resource Management). Noting the growth of freelance, white-collar workers as a share of the total US workforce, McGuire cited Nation1099, an ongoing project for which he is the principal researcher. This project seeks to “educate, empower and encourage the growing audience of solopreneurs in the gig economy who are hungry for information about how to start, manage and grow their businesses.”⁴ Among the key findings of this research is how a desire for work-life balance has driven white-collar workers to freelancing. McGuire notes that this evolving trend may have two effects: first, that among people who are conventional employees, suboptimal work-life balance may reduce interest in and ability to volunteer; and second, that for people who have shifted from conventional employment to freelance work, the incentives to volunteer may be diminished. Not only might volunteering represent a burden on the newly freed time of freelancers; there may also be reduced exposure to volunteer opportunities that would historically have come through an employer or coworkers.

⁴ For more information on this project, see www.nation1099.com.

McGuire's research is verified and expanded upon by the findings of a 2016 report from the McKinsey Global Institute, *Independent Work: Choice, Necessity, and the Gig Economy*. While the report cites important definitional challenges, largely connected to the lack of a single, widely accepted definition of independent work, it notes that an estimated 20-30% of adult workers in the US and European Union-15 make some or all of their income through independent work. In this study, independent work is defined by three components: significant autonomy on the part of the worker; task- or commission-based payment, as opposed to hourly wages; and a short-term engagement, rather than open-ended or years-long labor contract. McKinsey Global Institute included workers who provide both goods and services.

The findings note four broad categories of independent workers. Free agents actively seek independent work and earn all or most of their income in this way. About 30% of all independent workers, or 6% to 10% of all workers, are free agents. Members of this group reports high levels of satisfaction with their work. The second category of independent workers is casual earners, whose independent work supplements other income. People in this group also report high levels of satisfaction with their employment. The third and fourth categories are the "reluctants" and the financially strapped, respectively, whose independent work obligations are driven by necessity rather than choice and who report lower levels of satisfaction than the other two groups of workers. Of these four types of independent workers, only two are implied to have the resources—financial and otherwise—to engage in voluntary activity in addition to paid labor.

Also noted by the McKinsey Global Institute is that while business and political leaders see an array of benefits in rising rates of independent work, such as increased labor participation and a more active economy, the potential risks and challenges are also significant. The 2016 report notes that independent workers have “limited access to income security protections. . . . Minimum wage and antidiscrimination laws may not apply to them, and retirement security is a concern. The delivery of benefits is a key question” (15). These benefits include paid time off for volunteerism—which, while once a beloved guarantee in corporate workplaces, is now reduced to as little as sixteen hours annually as noted earlier (Delavan; Society for Human Resource Management).

Economic insecurity among independent workers due to the fragile system of benefits may exacerbate gaps in volunteer availability, as noted previously. If a growing share of young workers engage in work that does not provide structured benefits, they may miss the opportunity to volunteer on two counts: first, due to the absence of employer encouragement for volunteerism; and second, due to a need to allocate more hours over a longer portion of their working lives to activity that generates income, rather than giving their hours to causes of any kind. In light of these data, nonprofit professional theaters would benefit from prioritizing flexible, episodic volunteer opportunities, in order to fit the highly variable time-use patterns so many younger workers adhere to.

Chapter IV THEATERS' ORGANIZATIONAL MODELS IMPACT VOLUNTEER ENGAGEMENT

Generational Values Implicate Changing Organizational Structures

Generational differences also have implications for organizational structure and culture, as described in a 2016 report by the Hewlett Foundation:

The structures and cultures of the sector's arts organizations reflect the perspectives most associated with the generations that established these organizations, namely, the Silent Generation and the Baby Boomers. Broadly speaking, those perspectives include a tendency toward hard work and long hours, valuing independence, and appreciating the clarity and efficiency that comes with organizational hierarchy.

As Millennials and Generation Xers make up a larger proportion of the workforce, there is increasing pressure on arts organizations to include their perspectives. Those that identify with Generation X tend to value skills over long hours, want to strike a balance between personal and work time, and prioritize meaningful work ahead of career advancement. The work environments that Generation Xers favor are informal and flexible and provide fluid access to leadership and information. The Millennial work ethic is also inclined to question the notion of long work days and seeks to balance work and personal time with community involvement and personal development. Millennials tend to have a

very collaborative and entrepreneurial approach to work. They also lean toward organizational structures that are highly networked and goal-oriented and embrace technology and innovation. (Ono, “How Funders” 2-3))

The distinct generation-based definitions of corporate structure, leadership, and supervision Ono describes also have significant, and inconsistently addressed, implications for the engagement and use of volunteers.

Boards of directors have grown in size in some institutions, and staff expectations of board members have evolved (Chait; Stotts; Borenstein; Turner; Feldman). Some boards have developed formalized recruitment and development methods. However, no consistent approach is evident, despite efforts to galvanize change in board composition and management (Santora; Stotts; *Leading with Intent*). The Hartford Stage Company, for example, offers a recruitment worksheet in its board manual. This worksheet is designed to be a resource for current board members who wish to recruit new members. However, the worksheet is considered a rough guide and not a fixed protocol. Stotts candidly observes that the recruitment process is still largely aligned with people and social circles already connected to the current board. Once a candidate has been loosely assessed in terms of the board manual worksheet, a “getting-to-know-you” process may begin involving formal meetings with the staff, as well as various board committees (Stotts). While the formal recruitment process, in print, aligns with the notions of leadership Ono assigns to Millennials, the recruitment practice described by Stotts ultimately preserves the social hierarchies that are most comfortable for current board members, aligning with the Boomer values Ono assesses. If more Millennial members are desired, closer adherence to the printed protocol would be a more successful approach. Stotts

acknowledged that the Hartford Stage Company may need to change its approach to recruitment, for both voluntary and paid personnel. His concerns are reinforced at an industry-wide level (Turner; Tierney).

Volunteers whose effort supplements the work of paid staff are viewed with varying degrees of appreciation and suspicion. Nevertheless, these workers and their output remain an important element of the volunteer labor mix. Santora notes that professional services volunteers are critical, providing important expertise in legal matters and information technology, for example. He acknowledges, however, that some staff members have difficulty accepting input from professional services volunteers. Interestingly, less-skilled volunteers—those who answer phones and route calls, but do not review the chart of accounts, for example—seem to be “dying off,” indicating that ultimately TheatreWorks may need to hire skilled staff to absorb these more mundane functions (Santora). Noting that TheatreWorks is located in Silicon Valley, one of the most expensive metropolitan areas in the US, Santora also acknowledges that while many working-age TheatreWorks enthusiasts wish to volunteer in retirement, a substantial number are instead relocating to more affordable locales. While this is not a purely generational issue, the cost of living in arts-rich metropolitan areas may be a driver behind reduced arts volunteerism among Boomers and older members of Generation X as they transition to a fixed retirement income. It is possible that, despite personal interest in volunteering for the arts, these individuals will opt to move to low-tax states or municipalities, where their Social Security benefits or other retirement income can secure a more comfortable standard of living.

Where the data exists, ad hoc volunteers are typically younger than the average theater volunteer, according to executive directors with direct knowledge of the ages of their voluntary workforce. These individuals are among the youngest people in Generation X or are members of the Millennial Generation (Stotts; Borenstein). They typically contribute time in support of special events such as gala performances or other fundraising efforts. While the national data show that desire for episodic volunteer opportunities is strong, the details of episodic volunteer participation at nonprofit professional theaters is not monitored (Turner).

Unpaid interns, who are volunteers in the legal sense, are slowly vanishing from the volunteer landscape. While the unpaid internship was once a cornerstone of early career networking and learning, these positions are being redeveloped with more strategic goals in mind. One regional theater company in the study group has recently eliminated its voluntary internship program altogether; others note recruiting challenges, particularly among early-career workers who must grapple with student loan payments, and therefore are unable to consider working without financial remuneration (Stotts; Santora; Borenstein). Noting the demands of producing high-quality theater on a rigorous timetable, Borenstein stated that the “value proposition” of an unpaid internship was found to be inconsistent with the level of expertise the Long Wharf Theatre desired among entry-level staff.

The practice of volunteer guilds, once broadly popular, has also fallen out of common use. Delavan, the past Board President of CAVORT, observed that theater executives have shown an increasing desire for decision-making control to be concentrated in the hands of professional staff. This observation is repeated by

Borenstein, of Long Wharf Theatre, and by Feldman of the Pasadena Playhouse. Stotts, citing a need for quality control, also noted a preference for decision-making to be kept primarily in the realm of professional staff. While some staff leaders acknowledge that concentrating creative and administrative control in the hands of the staff has been a goal for decades, there is implicit concern that too much enthusiasm for staff control risks severing important community relationships (Stotts; Feldman; Borenstein).

As voluntary workers have been shifted away from tasks considered the work of the staff, they have a decreasing number of outlets to engage with the theater-making process (Borenstein). The growth of community engagement departments represents a change in how the community is regarded by professional nonprofit theaters, and possibly a re-alignment of where community involvement is welcome within professional theaters. While guilds may eventually fade out of practice altogether, professional theaters may simply be redirecting community interest away from nuts-and-bolts theater-making, and toward defensibly higher-level, if distant, modes of engagement. A volunteer may no longer be called on to cook for a potluck with actors and production staff, yet he may be invited to join an advisory council that reads new play scripts. A volunteer may not be needed to stuff envelopes, but she will be asked to join the Strategic Planning committee, bringing her professional qualifications to bear on mission fulfillment. All the executive directors interviewed agreed that community input was desirable in terms of mission fulfillment, however they were less convinced that specifically programmatic input was necessary—or feasible at all (Stotts; Santora; Borenstein; Feldman).

Overall, there has been a shift from a vertical organizational model to a relatively flat one. Where it was once the case that one or two executives were charged with most, if not all, decision-making, there is a growing industry-wide commitment to a distributed decision-making model, where the executives are primarily responsible for facilitating decisions made by one or more groups. This builds on the generative work of boards as recommended by Chait and his co-authors and makes room for more diversity of perspective in considering programmatic, operational, and strategic choices. It also reflects a fundamental change in the value that volunteers are expected to provide. Whereas once a volunteer's effort was primarily focused on carrying out tasks in service of an executive's vision, in today's model, it is more likely that a volunteer will be consulted by the executive or the executive's proxy, in the context of an advisory council, and that the vision will be advanced by paid staff or the executive him- or herself.

Externally-Driven Changes Decrease Number of Volunteer Opportunities

The regulatory, technological, and social environment in which professional theaters operate offers a decreasing number of traditional volunteer opportunities. Automation is reducing opportunities for traditional volunteer participation. As Borenstein notes, "you can't have people stuff envelopes, because we don't use envelopes." This mirrors changes in the national labor market; automation has reduced the number of jobs in other industries, while raising the bar for leadership, supervision, and good judgment among workers (Miller).

Quality control, a principal objective of professional nonprofit theaters with a substantial paid staff, is also recognized as an influence on where and how volunteers may be used. Theaters have a limited ability to create ad hoc volunteer opportunities; quality control in terms of onstage product is a necessary barrier to entry. Both Borenstein and Santora note that modern artist expectations often preclude volunteer-driven hospitality. Ms. Delavan notes that volunteer guilds once frequently provided meals and some degree of planning support for meet-and-greet events at the first rehearsal. Borenstein, Santora, and Feldman all indicated that, while well-intended, navigating the dietary and other needs of actors, directors, and other personnel made this practice more challenging than helpful, often requiring one or more paid staff members to plan and monitor the execution. This suggests that volunteers in the context of hospitality are, rather than a strategic means of engaging the public, merely fulfilling a tactical need to control costs, and that once volunteers' presence ceases to lower the cost of doing business, their effort is unwelcome. While the three managing directors' observations are grounded in modern best practices, Ms. Delavan's concerns reflect conversations with CAVORT members who volunteer at a variety of theaters across the country. Taken together, these perspectives reveal that the value of volunteer effort is largely assessed by theaters' staff in terms of financial outcomes, while the volunteers themselves determine value in terms of access to artists and the creative process. Nevertheless, since the staff control programming and scheduling, the financial priorities supersede volunteer aspirations and desires.

Insurance and other regulatory restrictions also prevent volunteers from engaging in non-automatable work. Borenstein states that “[Long Wharf] can't put people in the

scene shop,” due to both restrictions on the company’s insurance and rigorous expectations in construction quality. As the scenery used by regional theaters increasingly features computer-controlled elements, delicate special effects, and other complex components, there is a need for expert paid staff to be fully in charge of its construction, installation, and operation. Similarly, issues around public safety in assembly spaces also influence the ways in which theaters, as well as arenas, performing arts centers, and others approach venue security and staffing. The International Association of Venue Managers has highlighted the need for professional training to anticipate active shooter situations (Lang). Often emergency protocols are developed in consultation with expert counsel and require training for personnel involved in crisis response. Training volunteers to react to a shooting may be insufficient to protect the theater and its patrons. On a similar note, digital security has also become a priority (Simons). Securing digital data, which may include sensitive financial or personal information, sometimes requires software expertise that is costly to attain—even for paid staff, much less for unpaid workers. As a result, theaters increasingly require professional staff with expertise in Tessitura, Raiser’s Edge, or other software to manage and regularly secure data against ransom-ware or other threats. Depending on volunteers to do this work could easily expose theaters to a loss of public trust or, worse, a serious data breach.

Chapter V

THE VALUE PROPOSITION OF VOLUNTEERING WILL EVOLVE

As the Baby Boomers, Generation Xers, and Millennials seek opportunity and fulfillment through engagement with nonprofit professional theaters, the perceived benefit of volunteering will continue to evolve. Each of these three generations has a unique definition of service: Millennials, concerned with authenticity; Generation X with leadership and impact; and Boomers with prestige and scale (Ono, “Moving”). Arts organizations must grapple with how to articulate the value of volunteering in ways that honor the volunteer audiences they wish to cultivate (Webb, “For Arts Nonprofits” and “In Trump Times”). While some of the benefits to volunteers are durable—a sense of community or new learning opportunities—articulating the value of these benefits in generationally appropriate ways is rightly the charge of professional nonprofit theaters and individual staff members who interact with current and prospective voluntary workers. A theater that, for example, only promotes the importance of volunteer work when it visibly impacts the artists onstage, may lose the attention of potential Millennial volunteers, who wish to see recognition of volunteerism that impacts the theater’s entire staff. Alternatively, a theater that successfully engages a multigenerational volunteer workforce may find that, while the tasks vary little between generational pools, the volunteer opportunity itself is framed distinctly for each generation. Boomers might be invited to volunteer on the basis of the theater’s important contributions to the field and the size of the task at hand. Gen Xers, working alongside Boomers, might be invited on

the basis of the impact their effort will have on the audiences, artists, staff, and other individual stakeholders who share specific values surrounding family and personal contributions. Millennials, volunteering alongside Boomers and Gen Xers, might be engaged on the grounds that the company and its personnel exemplify core values such as authenticity and transparency. The tasks these three groups of volunteers perform are not nearly as important, in this instance, as how their engagement is framed at the time of the invitation.

In light of the racial diversity of rising generations, the value proposition of volunteerism may further shift to align with specific cultural affinities. As noted in the 2015 report *When Going Gets Tough: Barriers and Motivations in Arts Attendance*, US adults of differing racial heritage have equally differing motivations to attend arts and culture events of any type. It should be acknowledged that socializing with family and friends ranks highly across all demographic groups, however this motivation is not sufficiently strong or unique to the arts to make it meaningful for this analysis. For example, socializing with family and friends is also presumably a motivator for attendance at sporting events; attendance at a house of worship; and other activities. Among non-Hispanic Black, African American, Asian, and Pacific Islander respondents who were born in the US, celebrating cultural heritage was a major reason for arts attendance, with about a quarter of each demographic group citing it. In contrast, for White respondents born in the US, only 4.4% noted celebrating cultural heritage as a major reason for arts attendance. These data make clear that, as working-age adults are increasingly people of color, including Black, African American, Asian, Pacific Islander, and the many other races not identified as White, expressions of cultural heritage will be

an increasingly important component of what arts organizations are expected to offer in order to sustain and build new audiences. Bearing in mind that arts volunteers, including those who give their time to theaters, have overlapping motivations with arts audiences and paid employees, theater companies may be well served to craft future volunteer opportunities with an eye for how participants can celebrate their cultural heritage through voluntary work.

In addition to developing and carefully framing culturally specific volunteer opportunities, professional nonprofit theaters may wish to express the benefits to volunteers in ways that acknowledge generationally distinct goals, needs, and affinities. For Boomers, particularly those facing an uncertain or delayed retirement, tasks that do not reproduce their current or past employment but open new learning opportunities may be preferred (Santora; Stotts). For Gen Xers, tasks that are flexible enough to suit evolving family obligations may be viewed most favorably. For Millennials, creating authentic and new personal connections may outweigh prestige.

Going beyond generationally-targeted recruitment and development, theater companies have an opportunity to embrace more transparent conversations about the value of volunteer time. As income disparities in American communities and states cause growing alarm, acknowledging the dollar value of workers' time has become a rallying point for nonprofits that wish to cultivate younger markets and more loyal workers (Reeves; Rosenman). Theaters, which Baumol and others have shown repeatedly to be uniquely immune to labor efficiencies, are inescapably reliant on the good will of paid and unpaid workers to continue providing value to the theaters' communities. Building good will through recognizing the value of a volunteer's time in dollar amounts, perhaps

noted on annual reports and in financial documents as recommended by Independent Sector, could make a difference in cultivating future generations of volunteers and paid workers (“Value”). In the current model, where theater volunteers’ time is not recognized in financial terms, theaters imply that this type of contribution is taken for granted. No other type of contribution is treated so casually. Even TCG, which provides an otherwise rigorous annual report on financial trends at hundreds of American theaters, neglects to mention the financial impact of volunteerism beyond a single footnote to payroll expenses (Z. Voss et al. 32). A brief illustration is provided in the following section.

Illustrating the Value of Volunteer Hours

Based on data provided by DataArts,⁵ the total number of volunteer hours was calculated for professional nonprofit theaters with total annual operating expenses between \$5 million and \$10 million in the years 2014 through 2016. In 2016, sixteen theaters fit these parameters and reported volunteer hours for any purpose, including board service and special events. For these organizations, the average number of volunteer hours received was 10,762 per theater, with two of the theaters reporting over 35,000 hours each. If the theaters had all accounted for the value of these volunteer contributions in financial terms, using the current federal minimum wage of \$7.25 per hour, then the average value received by each organization would be \$88,890. This

⁵ The data used for this report was provided by DataArts, an organization created to strengthen arts and culture by documenting and disseminating information on the arts and culture sector. Any interpretation of the data is the view of the author and does not reflect the views of DataArts. For more information on DataArts, visit www.culturaldata.org.

represents 1.27% of the average total annual operating expenses reported by the same sixteen theaters. Alternatively, using Independent Sector's 2016 assessment of the value of a volunteer hour on a national level, \$24.14, the average value received by each of the sixteen organizations would be \$296,274, or 4.22% of their average total annual operating expenses for the same period. Using the same approach, thirty-one theaters fit the budgetary and reporting parameters in 2015. For this group, the average value received in 2015 would have been \$78,024 using the current federal minimum wage as the basis, and \$259,792 using Independent Sector's 2016 estimate of the value of volunteer time.

Two different approaches offer insight into the value received from volunteers, based on the findings above. The first approach explored is the value of volunteer hours received as a percentage of total annual operating expenses, consistent with the approach TCG takes to assigning member theaters to a certain group for analysis. The second approach considers the value of volunteer hours received as a percentage of total annual payroll expenses, providing a more nuanced view of the cost savings theaters receive through volunteers' efforts. Most theaters in both years of the dataset receive volunteer hours with value equivalent to 1% to 6% of their total annual operating expenses.

An examination value of volunteer hours as a percentage of total personnel costs produces even more compelling findings. In 2015, the thirty-one relevant theaters received volunteer hours equivalent to 17% of total payroll expenses, and in 2016, the sixteen relevant theaters received average volunteer hours equivalent in value to 6% of total payroll expenses. This decrease in volunteer hours as a percentage of payroll suggests that volunteers may indeed be leaving theaters even more rapidly than suggested

by the national and industry data, while paid staff or independent contractors shoulder the responsibilities volunteers used to absorb. If volunteers are indeed as important to mission fulfillment and operational integrity as the interviewees indicate, then this downward trend should be a worrisome sign.

Chapter VI CONCLUSIONS AND RECOMMENDATIONS

Existing Research Resources are Limited

There is limited public data on trends in theater volunteerism. Beyond what the Internal Revenue Service requires nonprofit organizations to report, few resources provide insight into volunteerism in the arts outside specific geographic areas (“LA County;” Borenstein; Stotts; Delavan; Turner; Leonard). Further, there is no apparent data collection mechanism to track volunteer engagement through electronic or virtual means (Leonard). It is possible that people are in fact more engaged in volunteerism than the current data suggest, yet existing instruments cannot capture this information.⁶

Volunteer data collected by arts service organizations fill some of the gaps described above, however these data are either wholly or significantly inaccessible to the public. DataArts offers a dataset with some detail on volunteerism within arts organizations, as well as financial and operating data. While this dataset can be used to paint a picture of trends in the nonprofit arts sector as illustrated previously, it is not naturally designed for an in-depth study of volunteer motivations, opportunities, challenges, or demographics and is best suited for use as a frame of reference. These data

⁶ While services exist that enable volunteer data collection, scheduling, and management, such as VolunteerHub and Volgistics, they do not publish data on volunteer demographics or turnover, and typically serve nonprofit clients working in the fields of health, social services, or religion. None of the theater executives interviewed mentioned using these services.

have formed the basis for in-depth inquiry into the demography and aspirations of volunteers; the Los Angeles County Arts Commission's efforts are one example of this approach. Further, DataArts' data products are vulnerable to outliers and gaps in reporting by certain organizations, making them unsuitable for in-depth analyses that focus on specific geographies, budget groups, or sub-disciplines such as musical theater or festival-style programming.

TCG's most recent available publication on volunteerism was released in 1999, nearly twenty years prior to this writing (Baker). The long silence on volunteerism suggests that understanding and serving volunteers is a low priority. While TCG Member Theatres submit data on the number and estimated hourly contribution of voluntary workers, these data are restricted from use by any non-member theatres, making it unavailable for analysis in the research for this paper (Turner). According to Lynette Turner, the TCG data do not include demographic details on volunteers, making it difficult to use the TCG data to create specific, measurable volunteer engagement goals and strategies. For example, while the TCG data might be used to understand how many volunteers typically support fundraising events at certain theaters, it would be impossible, absent a supplementary questionnaire, to determine how many of those volunteers are also donors; how many are retirees, working adults, or students; or how many identify with a particular racial, ethnic, or culturally specific group.

While there is a national service organization for theater volunteers, it has limited capacity for research and data collection. The Conference About Volunteers of Regional Theatres, or CAVORT, was founded in the 1970s, with a mission to "establish a network for the exchange of ideas, projects, and fund-raising activities vital in the support of

professional, not-for-profit regional theatres” (“About”). Run by a national cohort of volunteer board members, CAVORT closely resembles a guild or “friends of” association. True to the organizational mission, CAVORT’s biannual conference and quarterly newsletter bring volunteers and volunteer-focused theater staff together to exchange ideas. However, there is neither mission alignment nor personnel capacity to launch a research effort absent a third-party benefactor (Delavan).

Further research is needed to paint a complete picture of volunteerism in professional nonprofit theaters. What is clear from the existing data is that slow but inevitable changes in practice and intent are impacting how people of different generations volunteer in nonprofit regional theaters—with implications for the sustainability of these theaters.

Recommendations for the Field

Regional theaters are encouraged to closely examine the value proposition of volunteering. This may be done through the eyes of volunteers at all levels of responsibility and with respect for the generationally specific concerns of target volunteer populations. Volunteers are a necessary component of both labor resources and public endorsement, and their involvement signals community approval and investment (Stotts).

Taking a lesson from the visual arts field, a modern best practices document for theater volunteers may be beneficial to the field. Such a document could be produced by a service organization such as CAVORT or TCG. A useful example of this type of document is the one published by the American Association for Museum Volunteers, or

AAMV (“Standards”). Among the recommendations provided by the AAMV is that “accurate records are kept to show the scope and breadth of the volunteer involvement in the life of the institution.” One possible solution to this is for TCG or another service organization to use existing datasets to reflect the contributions of volunteers, in an existing publication such as the annual report *Theatre Facts*.⁷

Technological innovations such as customer relationship management software, social media, and web-based data analytics are not yet fully appreciated by theaters as a resource for understanding all of their available human resources. While automation has reduced the number of tasks once performed by theater volunteers, rising interest in complex evaluation may have increased the need for volunteers to be participants in the evaluation design and process itself (McGarvey). As evaluation methodologies and expectations become more sophisticated—and as commitments to equity, diversity, and inclusion prevail across the nonprofit sector (“Equity”)—the need for diversity of thought has grown. Community advisory councils, for example, are a useful means of gathering input from varied cultural groups. Many professional nonprofit theaters use ad hoc or permanent committees to cull community and industry perspectives for use in ongoing program and institutional evaluation (Borenstein; Stotts; Feldman; Santora; Turner). However, the basis for most evaluation processes tends to focus on relationships grounded in financial transactions. Expanding the scope of inquiry to include all of the people connected to a given theater—inclusive of ticket buyers, paid staff, freelance

⁷ In *Theatre Facts 2016*, the word “volunteer” appears once on page 32, in the context of explaining possible reasons for low or no expenditures by certain theaters on front-of-house expenses, marketing, and development job functions.

workers, and volunteers of all types—would help theaters understand the opportunities to engage and retain people in generationally appropriate ways.

Volunteer opportunities that rely on generative thinking may be more likely to result in more racially, socioeconomically, and otherwise diverse volunteer pools. However, this outcome is not guaranteed. In consideration of recent findings that theater audiences are radically local, professional nonprofit theaters are encouraged to use the demographics and other characteristics of their immediate neighborhood or neighborhoods as a guide for developing volunteerism benchmarks that suit both the institution and its location (G. Voss et al.).

Framing the Opportunity for Each Generation

The three generations of working age have unique preferences in terms of how and why they are recruited, how their contributions are recognized, and how and when their time is leveraged to benefit professional nonprofit theater companies. Theater companies should begin or continue to craft volunteer opportunities with these factors in mind. As Baby Boomers age into eligibility for retirement, they may seek second careers that tap into long-dormant passions and interests. At the same time, they may be unable to volunteer as regularly as once predicted due to shifting economic influences. Offering flexibility to this group may be key to retaining them in the volunteer workforce once they enter retirement. Members of Generation X, highly educated and ambitious, require volunteer opportunities that account for the remarkable demands currently placed on their time and attention. As the first generation widely understood to perform caretaker duties

simultaneously for both younger and older generations, Generation Xers' time is in high demand, and their responsibilities to family must be considered in both strategic and tactical efforts to engage their attention. Millennials, inspired by and committed to collaboration, but economically disadvantaged in ways that impact their long-term access to financial and time resources, require a volunteer engagement strategy that encourages collaborative effort while making space for work-life balance and other personal pursuits. Theater companies that frame volunteer recruitment and development with consideration for these needs and challenges may find that their volunteer labor pool is stable, even when the professional nonprofit theater industry, or the nonprofit arts sector at large, struggles with volunteer engagement in years to come.

Nonprofit professional theaters are adapting to the needs of these three generations, but more focused effort is needed. The lack of data on volunteer engagement is a barrier to industry-wide change. New engagement platforms, such as web conferences, are becoming accepted, albeit slowly. At the organizational level, some theaters have begun to contemplate tools that would allow more flexible engagement by some volunteers. For example, the Hartford Stage and Long Wharf Theatre currently or may soon use web-based video conferencing for committee meetings and other activities (Stotts; Borenstein). Both theaters already use social media for marketing and development purposes. However, volunteers' virtual activity has yet to be documented either at the institutional or industry level, making it difficult for administrators and other paid staff to establish meaningful priorities for volunteer engagement, such as "use web-conferencing to achieve 80% or better board attendance at all meetings."

Life stage should also be considered an indicator of volunteer readiness for organizations that are seeking volunteers. Rather than establishing goals such as “seek more youth volunteers” or “establish an age-diverse Board,” theater leaders might articulate the desired life stage-diversity of volunteers, using measures consistent with local or regional populations as goals. “Engage students and recent graduate volunteers, in proportion to the number of people in our area who fit this description” might draw in more youthful volunteers, as well as volunteers who are recent graduates, having returned to college after raising children. An age-diverse board may instead be described as a board with people of many different life stages, including those beginning careers and those with extensive résumés; those with and without children; corner-office executives and stay-at-home parents. This approach need not be at odds with board members’ fundraising capacity. Life stage should be a valuable supplement to maximize the diversity of a board of directors or any other decision-making committee.

Volunteers and Their Contributions Should be Counted

A mechanism for counting virtual volunteers is critical for future research. Through technologies like email and social media, and the resulting virtual ambassadorship opportunities, volunteers of differing ages and affinities can and do contribute their time. This effort should be considered in data collection both by individual theaters and national data aggregators (Saunders). As the work of volunteers shifts to decision-making and advising, virtual channels provide opportunities for volunteers to engage without leaving their home or office, and their effort should not be

discounted by virtue of the communication technology used. For theaters wishing to engage mid-life adults with children, currently older Millennials and younger Generation Xers, virtual channels may be crucial to ensuring sustained volunteer participation. While virtual volunteerism might exclude those people who lack access to certain technologies or high-speed internet access, it may also open opportunities for historically un- or under-engaged populations.

In addition to counting virtual volunteers, a coordinated effort to trace and report on the demographics of volunteers is encouraged (Ellis, “It’s Time”). Absent data reflecting the demographic and economic characteristics of volunteers, little can be done to cultivate and leverage this labor pool. This data, when gathered and organized, may be used in a fashion similar to TCG’s annual *Theatre Facts*. It could inform strategic planning that focuses on workforce development, employee training, and organizational responses to issues of diversity in the theater industry, among other purposes.

If nothing else, the value professional nonprofit theaters receive from volunteers should be recognized in a manner consistent with recognition of other donations. For volunteers contributing professional services, the recommendations made by the Financial Accounting Standards Board, or FASB, are clear (*Statement*). FASB states that volunteer time is considered to be measurable for accounting purposes

[If] the services received (a) create or enhance nonfinancial assets or (b) require specialized skills, are provided by individuals possessing those skills, and would typically need to be purchased if not provided by donation. Services requiring specialized skills are provided by accountants, architects, carpenters, doctors, electricians, lawyers, nurses, plumbers, teachers, and other professionals and

craftsmen. Contributed services and promises to give services that do not meet the above criteria shall not be recognized. (6)

FASB further states that reporting entities need not identify contributed services as revenues. However, considering condition (b) above, it is likely that a majority of professional services volunteers, some theater interns, and potentially other volunteers who receive special training for certain tasks related to safety would be considered “professionals and craftsmen” and would therefore merit recognition in a theater’s accounting of contributions received.

Should inclusion of volunteers’ time in accounting records be considered risky or inappropriate in light of the organization’s mission or funding relationships, simply knowing the value received and being able to meaningfully recognize it may positively impact potential volunteers’ perceptions of theater volunteering opportunities. A theater may, for example, wish not to report volunteer contributions on its financial statements because it would raise the organization’s total annual revenue, potentially shifting the theater into the next budget group as defined by TCG. Joining a new budget group on the basis of volunteers’ contributions of time would be unlikely for most theaters with total annual operating expenses exceeding \$5 million. However, for theaters with total annual operating expenses below \$1 million, reporting volunteer hours as contributions received could conceivably disqualify these organizations from certain institutional grant-making programs, certain types of public support, and organizational partnerships. The intent of this recommendation is not to reframe the financial capacity of organizations in such a way that mission fulfillment would be compromised; it is to emphasize the range of options available to theaters wishing to document and report volunteers’ contributions.

Volunteers Are Part of Workforce Development

Volunteer recruitment and development are natural components of overall workforce development and should be treated as such. Many theaters once recruited paid staff from among volunteer interns and professional services volunteers. However as unpaid internships disappear and professional services workers find themselves challenged to commit to regular volunteer work, these channels for professional development have narrowed (Borenstein; Santora). Given their labor-intensive core programming, professional nonprofit theaters may wish to engage in strategic planning with workforce development top of mind.

Theaters that adopt inclusive hiring practices⁸ may reasonably be expected to apply the same approach to volunteer engagement. In any case, they are encouraged to view paid permanent staff, artists and other contract workers, and voluntary workers at all levels as cooperative elements of an institutional, or even industry-wide, workforce strategy. Theaters whose leadership and management teams do not view voluntary workers as a part of their institutional commitments to diversity and inclusion may struggle to meet organizational goals pertaining to a diverse workforce. Consultants, facilitators, and third-party evaluators may also benefit the field by considering volunteers, broadly defined, when analyzing organizational practice and strategy. Indeed,

⁸ Inclusive hiring practices are those that implement the Rooney Rule, named after Pittsburgh Steelers owner Dan Rooney, who led an effort to require teams to consider minority candidates for leadership positions before filling those jobs. An essay on the Rooney Rule's application in theaters by director Joseph Haj can be found at www.americantheatre.org/2017/08/31/succession-and-diversity-must-go-hand-in-hand/.

as the gig economy absorbs a greater share of working-age adults, and as adults of retirement age reconsider volunteering for financial and other reasons, professional nonprofit theaters may be particularly disadvantaged without a strategic workforce cultivation plan.

Recognizing Time Given

Bearing in mind the variations in how, where, and to what end nonprofit theaters use volunteer hours, proposing a single approach to valuing volunteer hours would be meritless. However, theaters are urged to consider ways to recognize the time volunteers contribute in ways that are consistent with recognitions of cash donations or in-kind gifts. For example, many nonprofit theaters publish a list of major donors who contribute to the annual fund in their playbills. It would be an unusual and potentially welcome gesture for theaters to include volunteers among donors, where the volunteers' contributions in hours are comparable in monetary value to established tiers of giving. A volunteer who spends five hours each month writing and editing a newsletter may not have the means to make a donation of \$1,000 annually, however her time is worth about \$1,448.40, according to the Independent Sector rate.

Absent demographic and other data on volunteers, it is difficult to say what the outcomes of this reporting approach might be. One might speculate that over time, donor rolls would become more diverse if and when volunteers' contributions are treated with the same care as donations of cash and in-kind goods or services. While it is beyond the scope of this study to predict the outcomes of such a change on an industry-wide basis,

the opportunity for professional nonprofit theater companies is clear. Theaters are urged to find ways to recognize contributions of time in a way that is more meaningful than current practice.

Conclusion

The value received by professional nonprofit theaters from volunteers is largely unmentioned in the available literature—a tremendous omission in light of the scale of this value. In no other area of nonprofit reporting is any gift or service of such value treated with such disregard. It would be hard to conceive of a theater receiving a cash donation equal to 1% of its total annual operating expenses, and then failing to recognize the donor in a way that explicitly acknowledges the value of the gift.

If a theater's mission includes functioning as a community anchor, driver of local or regional dialogue, or being a contributor to local quality of life, then the continued use of volunteers is not just financially advisable but central to mission fulfillment. Theaters that wish to be significant community players will find that serious, multifaceted volunteer engagement is vital to this goal. Developing appropriate, rigorous, and industry-wide approaches to documenting and recognizing volunteers' demographics and the value of contributed time is crucial.

The time is ripe for nonprofit professional theater companies and theater-serving organizations to revisit their approach to volunteerism, as a means of subsidizing activity and as a means of mission fulfillment. Doing so now, as generational attitudes, values, and needs shift, may ensure the future vitality of theaters more effectively than waiting

for the decline in volunteerism to be felt. Professional nonprofit theater companies have an opportunity to redefine the terms of volunteer engagement in ways that will support future organizational vitality and honor the new and complex ways that prospective volunteers respond to labor, volunteerism itself, and time-use.

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