

Performance Management for Performing Arts – A Framework for the Evaluation of Artistic Quality in Public Professional Opera Houses

Francesco Chiaravalloti, PhD student
Faculty of Economics and Management, Technische Universität Berlin

*A graduate in Management Engineering from the University Tor Vergata in Rome, **Francesco Chiaravalloti** also holds an intermediate degree in piano from the Conservatory Licinio Refice in Frosinone. Having worked in Berlin for Siemens AG, Deloitte & Touche and the Fraunhofer Society, he is currently conducting his PhD research project in the field of arts management at the Technical University Berlin. He is also a freelance film journalist.*

Abstract

The objective of the research presented in this paper is the development and validation of an opera-specific framework for the evaluation of artistic quality from the specific point of view of arts management. To achieve the necessary agreement on the framework between the main actors of the cultural system “opera”, this framework has to consider all the factors forming the current conception of the artistic quality of opera houses. This has been obtained through an interdisciplinary analysis of the latest contributions coming both from the academic world and from practice, whose results are presented here in detail. Through a theoretical and practical validation, this innovative framework will set the standards for further research in performance management for performing arts and for the social sciences interested in the evaluation of artistic quality of opera houses.

Keywords

Performance Management and Measurement, Evaluation of Artistic Quality, Performing Arts, Opera Houses, Interdisciplinary Approach.

Introduction

Artistic excellence is the main goal of public professional opera houses (Hoegl 2002, p. 442). On the one hand, artistic quality is the most credible argument when applying for public funding (Lukas 1994, p. 173). On the other hand, artistic quality is more generally considered the most important success factor for performing arts organisations (Kotler & Scheff 1997, p. 532).

Growing cuts in the budget of national and local governments have led to serious consequences, both for governments and the internal management of opera houses: governments need to justify their funding policy to the public and opera houses need to justify their existence and their costs to the governments and thus to be held accountable to the public. The measurement of organisational efficiency and effectiveness in opera houses thus becomes an imperative issue. Because of the specific artistic nature of the main output of opera houses, that is, artistic performance, indicators for performance quantity are not sufficient to measure the real value produced by the individual organisation. As a result, the evaluation of artistic quality becomes necessary (Lukas 1994, p. 2) and indicators for the performance quality are required (Schwarzmann 2000, p. 162).

So far, no systematic use of explicit indicators for artistic quality in opera houses is known (Boerner 2002). This is due partly to the difficulty of evaluating an artistic object. The evaluation of artistic performance is *per se* a subjective process involving personal perception, values and taste. Furthermore, values and tastes are strongly related to a specific time and culture (Nielsen 2003, p. 237) and to the individual personal experiences and expectations. Thus, it is often assumed that the different actors of the cultural political system (audience, governments and other patrons, artists, critics, etc) have different views and interests concerning the evaluation of artistic performance (Sicca 1997, p. 218). In this context, it is difficult for both organisations and governments to develop a balanced framework and balanced indicators for the evaluation of artistic quality that also respect the very specific artistic nature of the product considered.

This paper presents an interdisciplinary approach *to* and the first results *of* the development and the theoretical validation of a universally acceptable framework for the evaluation of artistic quality in opera houses according to the very specific and interdisciplinary point of view of the arts management. Public professional opera companies have been chosen as the object of this study because of their financial weight in the funding of arts and culture (Koch 2002, p. 182). For instance, public opera houses in Germany absorb up to 60 % of public funding for culture (Fabel 1998, p. 56; 242). More generally, non-profit professional opera houses also raise a significant part of their budget from public funding and can thus benefit from the developed framework. In addition, as the artistic quality evaluation framework developed here includes the aspects orchestra, drama, singing, and dance, parts of it may be used as a starting point for further research into companies in these areas.

After the formulation of the main research question and the presentation of the innovative interdisciplinary approach to problem-solving in the field of arts management, a section will be dedicated to the objectives and the potential usefulness of the research results. In the third section, the details of the literature review will offer insights into the current conception of artistic quality in opera houses. In conclusion, the most significant results and the further steps of the development and validation of the framework will be presented.

Research Question and Methodology

The evaluation of the artistic quality of opera houses is a difficult task. Nevertheless, evaluation practices have been available in the opera world. The evaluation of artistic performance plays a very important role for the image of the individual companies and artists (Kleber 2002, p. 1). This is true for the annual survey of the German language magazine *Opernwelt*, in which international critics select the opera house of the year, the singer of the year, etc. The evaluation of artistic quality plays an even more important role when it is used as a decision criterion for funding opera houses. For example, a negative evaluation of an opera house by the Dutch *Raad voor Cultuur* may lead to the cancellation of funds and thus become a threat to the survival of the affected opera company (Raad voor Cultuur 2004).

Considering the subjectivity and the dynamics involved in the evaluation of artistic quality on the one hand, and the importance of current evaluation practices on the other, the transparency of the evaluation becomes a key issue. While transparency can be demanded of critics and journalists only on the basis of professional ethics, thus not allowing us any definite expectations regarding the transparency of their criticism, it is imperative that an “expert” evaluation on behalf of governmental funding institutions is carried out transparently (Auvinen 2001, p. 274; MPAB 2002). A transparent evaluation occurs when the evaluator specifies the

content of his evaluation. It is not enough to state that the artistic quality of an opera company is “very good” or “insufficient”, etc (Glejser & Heyndels 2001, p. 125). It is necessary to specify which factors of artistic quality are evaluated and why a certain conclusion is drawn (Schwarzmann 2000, p. 155). Although subjectivity cannot be avoided in this process, the evaluator is thus obliged to express his opinion systematically and analytically. As a result, arbitrary conclusions are more unlikely (Nielsen 2003, p. 240-241). To sum up our first assumption: **Transparency is a required attribute of an “expert” evaluation of artistic quality.**

The basis for a transparent evaluation of the artistic quality in public professional opera houses is the development of a specific framework. In the development of the framework a relevant issue must be considered: the agreement on the evaluation of artistic quality between the involved actors of the cultural political system “opera” (MPAB 2002). Firstly, the artistic management and staff of opera houses claim freedom for their artistic goals. Therefore, they may consider any operationalisation and evaluation of their artistic goals as a control instrument and thus refuse it (Meyrick 1997, p. 302). Agreement on the evaluation methodology would improve the acceptance of the evaluation itself within arts organisations. This is possible if management tools and methods are developed from the specific artistic point of view and are not only a mere imitation of practices in other areas (Beirne & Knight 2004, p. 33-38). In particular, it should be avoided that tools and methods development is seen as a way towards “technocratisation” (Nielsen 2003, p. 239-241) and the bureaucratic control of arts organisations (Meyrick 1997, p. 300).

Secondly, the management is also concerned about financial figures. These depend both on funding through the government, philanthropists and sponsors, and on the direct income from ticket sales. Furthermore, government funds for public opera houses come directly from taxes paid by the public. Thus, the interests of regular and potential audiences as well as the cultural policy aspects must not be neglected in developing a methodology for the evaluation of artistic quality. In most European countries the interference of politicians with the internal management of opera houses is usual and it can be difficult to clearly define the limit between an internal and an external evaluation. In more developed cultural policy systems – we mean the ones where the management has the middle to long term freedom to realise the projects for whose plans the opera has received funding, without the daily intrusion of politics – a common framework for the internal and the external evaluation would anyway support a clear artistic positioning of the individual opera house.

Finally, above all in Europe, it is not possible to neglect the role that musicology claims for itself with regard to the evaluation of musical interpretations. According to Adorno, only those who can read and analyse notes are qualified “to *speak* about performances” (Adorno 1968, p. 14; my translation and italics). Let alone *evaluate* them! A framework for the evaluation of artistic quality that will also be used for an external evaluation – for instance, through the government for funding decisions – will never be accepted if it is not the result of a serious confrontation with the musicological point of view. Although this fact is accepted in the field of arts management (Heinrichs & Kleim 1996, p. 30), an appropriate semantic study in this area is currently “far from complete” (Jaumain 1997, p. 223).

To sum up, agreement on the evaluation framework between all the actors of the cultural political system “opera” is a prerequisite for the practice of evaluation. That means agreement on the conception of quality (Schwarzmann 2000, p. 162), in the sense of the quality factors to be evaluated and not in the way the individual factor is perceived and evaluated by the different

actors (Comedia 2003). To sum up our second assumption, **agreement on the content of the evaluation of the artistic quality of opera houses is necessary.**

In order to develop a universally acceptable framework for the transparent evaluation of artistic quality in opera houses, this framework will have to consider all the factors forming the current conception of artistic quality of opera houses, without neglecting any actor and discipline involved. This leads to the formulation of the following research question: **Which factors form the current conception of artistic quality of opera houses?**

This research question and the field of study in which the research is conducted, the arts management, require an interdisciplinary approach in the sense of Sicca: “[...] studies [in arts policy and management] grow out of a mutually stimulating relationship with the social sciences (management, organisation, policy) on the one hand and the humanistic sciences (epistemology, aesthetics, history of art) on the other” (Sicca, 1997, p. 204). Scoping out all these different disciplines in order to answer our research question prevents us from importing existing solutions from an individual area without considering the specific characteristics of the artistic product considered and the multiple actors involved. Moreover, it has already been shown that existing quality concepts in other profit and non-profit areas can only find a very limited applicability in opera houses (Boerner 2002). An interdisciplinary approach thus allows for a wider agreement on the research results between the different actors of the cultural policy system (audience, patrons, artists, critics, etc) (Schwarzmann 2000, p. 162), because the individual disciplines considered pay attention to the special interests of each of these actors.

Sicca’s interdisciplinary approach to arts policy and management studies is adapted here to the specific research object, that is, opera houses, and the specific research question concerning the artistic quality. Thus it is expanded here on the social sciences side to include marketing as the specific management area concerned with customers’ expectations and reception of quality; cognitive psychology as the branch of psychology that is most interested in perception processes, including the auditive and visual ones involved in an opera performance; cultural economics, whose main issue is finding a correlation between artistic quality and economic variables; and sociology of music as the branch of the sociology interested in the role of music in society and thus as a possible source of insights into the issues of audience motivation and expectations of opera attendance. On the humanistic sciences side, music criticism is the natural sibling of music aesthetics. Music aesthetics and criticism thus represent the musicological point of view in our research. Epistemology can be defined as the critical analysis of actual methods and techniques of knowledge. In the case of an artistic object, knowledge can be defined as the primarily sensible process that makes the description of this object possible. Considering that the original definition of aesthetics given in 1750 by Baumgarten in his “Aesthetica” was *scientia cognitionis sensitivae* (the science of sensory knowledge), in this paper epistemology is interpreted as the critical analysis of actual methods and techniques of *sensory* knowledge. Concerning our interdisciplinary literature review, this means that we do not analyse the literature on epistemology separately from the literature on music aesthetics, because we expect that the issues interesting for our research question already arise within the academic discussion on music aesthetics. Music history is considered with regard to its influence on the *current* conception of artistic quality and is thus not analysed as a separate discipline.

Empirical experience, the third source for the growth of arts policy and management studies in Sicca’s approach, is given significant consideration here. Nevertheless, due to such a broad area of enquiry and the consequent problem of setting the limits for the literature review in the individual fields, we were obliged to set some constraints. For instance, for the fields of

empirical experience, primary sources have been considered insofar as the effort to find them does not negatively affect the plan for the overall research. In fact we argue that in such an unexplored research area, the innovativeness of the interdisciplinary approach is at least as important as the completeness of the sources review in any individual field. Furthermore, a major effort is required to organise and harmonise the results of the literature review in order to create a framework for the evaluation of the artistic quality that doesn't contradict the main findings and views in the musicological research. This will give the framework the required theoretical validation. Any further research that will deepen the literature review in any individual field and come up with new results will be able to be integrated in this framework, as long as it is built into it consistently.

In accordance with this interdisciplinary approach, the literature research conducted in order to answer the research question covers the following fields:

academic discussion:

- arts policy and management;
- management, marketing, organisation and cognitive psychology;
- cultural economics;
- sociology of music; music aesthetics and criticism;

empirical experience:

- reviews and rankings in the media;
- artistic staff selection procedures, internal documentation and magazines, audience surveys;
- decision criteria for competitions;
- experts' evaluation on behalf of funding institutions.

Apart from the theoretical validation that is provided by the interdisciplinary approach with the special role assigned to musicology, we argue that a practical validation of the framework is required in order to be able to present a really innovative result. In order to finally validate the framework, an empirical study will be carried out (Chiaravalloti 2005).

Objective and Potential Usefulness of the Research Results

The objective of the presented research is the development and validation of a universally acceptable framework for the transparent evaluation of artistic quality in opera houses. The opera-specific framework is one of the first examples of management methods developed purposely for the field of Arts Management and from the specific artistic point of view of the considered organisation. This example should be followed by more performing arts and other arts organisations. The liberal trends in the market and the growing constraints on the governmental budgets will not leave the public arts organisations untouched. It is more than plausible that in a few years governments will need to decide on their funding policy according to strict roles. Artistic quality will surely play a very important role (Belfiore 2002, p. 101-102). If the organisations develop their own specific management systems and play an active role in the specification of evaluation standards, they will not need to unwillingly and passively accept those imposed by governments or other experts, thus avoiding "technocratisation" (Nielsen 2003, p. 239-241) and bureaucratic interference with arts organisations (Meyrick 1997, p. 300).

We explicitly see the development of a framework for the evaluation of the artistic quality in opera houses as a contribution to the internal and external discussion of the artistic values and goals of the individual organisation, thus supporting the alignment of all organisational efforts with the achievement of the artistic goals.

In this sense, the application of the framework will help opera houses to improve their practices of internal performance measurement and management (Schwarzmann 2000, p. 219-220) and to align their initiatives with the general strategy (Kotler & Scheff 1997, p. 203). By using the framework the management can decide whose evaluation – artistic staff, general staff, peers, audience, critics etc – to consider in order to have a qualitative indicator of the artistic quality of its own opera house. What is more, the framework can also be used as an internal communication tool to discuss systematically the artistic goals within the artistic staff and with the non-artistic staff. This is also possible with regard to the discussion with the external actors: the framework is expected to facilitate the legitimization of opera houses applying for funding from governments and other patrons. This would definitely be the case if opera houses were aware of the evaluation framework used by experts acting on behalf of governments and other patrons. Arts patrons, and particularly governments, will also profit from the framework by enabling themselves to justify their funding policy to the public. A general agreement on a common framework for artistic quality will also stimulate a cultural discussion in the community that goes beyond the financial aspects usually involved (Nielsen 2003, p. 244-245).

With regard to the academic contribution, the framework is the basis for the development of performance indicators for artistic quality. The difficulties caused by the necessity of an interdisciplinary approach are ultimately balanced by the usefulness of the research results for many disciplines. Four main areas of research within the field of arts management can profit from the development of the framework:

- performance measurement and management, whose main interest is in finding an operationalisation for efficiency and effectiveness in opera houses that pays attention to the artistic nature of the output. This would give a strong impulse to the use of performance management systems like the Balanced Scorecard (Kaplan & Norton 1992) in performing arts organisations (Kaplan 2001). In fact, no set of indicators for the measurement and management of opera houses performances can be “balanced” enough, without the use of specific indicators for the main goal *artistic quality*;
- marketing management, which needs a conception of quality that builds a bridge between artistic quality and participation goals (Boorsma 1998, p. 158), and relationship marketing, which is particularly interested in an instrument that is able to garner audience opinions in order to develop loyalty and advocacy (Radbourne 2002);
- leadership, whose main interest is measuring and comparing the artistic results of different styles of managing the artistic staff (Boerner 2002);
- new product development, which is interested in instruments to gather reception data about a specific production in the early production stages (Crealey 2003).

The field of arts policy can profit from the development of the framework to foster cultural political research in the area of program evaluation. A contribution is also made to research in cultural economics, whose main issue is finding a correlation between artistic quality and economic variables (Tobias 2004, p. 109).

Literature Review on the Current Conception of Artistic Quality in Opera Houses

The results of the literature review are presented according to the distinction made by Boerner between profile quality and performance quality (Boerner 2002, p. 64). The profile quality describes the season program offered by an opera house, consisting of the works selected and the artists involved. The performance quality deals with the quality of the performed program, thus with the quality of the core product of opera houses, that is, the individual performance. For both of them we can identify *aspects* and *criteria* (Haller 1975, p. 78). An aspect is generally a part or feature of something. In our case we will have aspects of the program (e.g. premières in season) and aspects of the individual opera performance (e.g. orchestral sound and singing). A criterion is generally a standard or principle by which something is judged. In our case we will have criteria for the program (e.g. originality) and criteria for the individual opera performance (e.g. authenticity). While the aspects to be considered are somehow inherent in what we want to evaluate and thus universally acceptable, criteria are the result of a tradition and are continuously subject to critique and review. In this sense, when we decide to include a criterion in a framework for the evaluation of artistic quality, we definitely make a choice that concerns musicology and that must thus be theoretically validated through the current musicological discussion.

Profile Quality

Programs that offer to the audience a mix between experiment and convention, premières and repertoire stagings, new discoveries, revivals and repertoire works seem to receive most acceptance, both from the academic discussion in arts and policy management (e.g. Busse 2002, p. 200; Cloot 2002, p. 363), in management, organisation and marketing (e.g. Fabel 1998, 122-124; Hoegl 1995, p. 23-29; Lukas 1994, p. 162) and practitioners (e.g. Staatsoper Unter den Linden 2002; Jaumain 1997, p. 222). For the latter, innovation – also in terms of new commissions – plays a central role in a program in order to stimulate the audience (Metha 2003, p. 6; MPAB 2002; Schreiber, W. 1978), while for Brooks and Kushner (2002, p. 21) “the number of premières” is still the most relevant measure of “leadership”. Again, innovation, in the sense of the choice of most recent works, leads to better performance evaluations in music competitions (Glejser & Heyndels 2001). Not much value is added to the discussion about profile quality by the cultural economics, apart from unconvincing attempts to classify works according to the time of their composition (Urrutiaguer 2002, p. 189).

With regard to actual experts’ evaluations, the Dutch *Raad voor Cultuur* (2004, p. 206-223) seems to rely strongly on the fame and proven artistic value of the artists involved in the planned projects rather than to apply transparent criteria regarding the content of the projects submitted. For instance, while in one case a mixed repertoire including works from the 20th century leads to a positive judgement of the program, in another one a mix of works from the 20th and 21st century – usually the less performed works – is surprisingly judged as not enriching what is offered by the general national opera landscape. “Unique” positions and program variety are prized. For the typical Dutch “travelling operas”, the *Raad* suggests that they play mostly repertoire works and even operettas to satisfy the big national demand of these productions.

The more systematic approach to identify criteria for profile quality is made by Boerner (2002, p. 69-72; 2004), who derives three criteria for the profile quality from the two components of the public cultural task assigned to the opera houses in Germany: “program diversity versus specialization” within the individual organisation and “program conformity versus originality” within the totality of organisations from the task of promoting the repertoire; “program modernity

versus traditionalism” from the task of developing the repertoire. As to the second criterion, most works performed in German opera houses date from the 19th century.

Performance Quality

Very few contributions to the question of identifying the semantic factors building the conception of performance quality in opera houses come from the arts policy and management discussion. Auvinen identifies three aspects of an opera performance: the “dramatic, musical, and visual” (2001, p. 271). Concerning the dramatic and visual aspects, Fabel distinguishes between dramaturgy, staging and acting quality (1998, p. 122-124). Comedia (2003) defines five criteria for artistic quality in general: technique, which distinguishes much professional from amateur arts activity, and is relatively easy to judge; originality, as a concept that, although rather overtaken by the concept of innovation, can “embrace the technically-based notion of innovation, while recognising the importance of the new utterance alongside the new mode of expression”; ambition, as the aspiration “to stand alongside the best of the past, and the international present, and [to] challenge both creators and viewers to extend themselves beyond the norm”, thus legitimating a “call on public resources”; connection with society, which is not in contradiction with artistic freedom, if we think that “the opposite of relevance is irrelevance, not independence or artistic integrity”; magic, as the ability of the art product “to provoke non-rational responses in us, inexplicable and inexpressible reactions that may stay with us for far longer than the most eloquent and lucid exposition”. Comedia is perfectly conscious of the many interpretations that can be given to these criteria: “the intention is not to define artistic quality, but to provide a structure for response and discussion”, an approach we fully agree with.

It is interesting to notice the relevance of a systematic approach to the evaluation of artistic quality in opera houses in the leadership research. Lukas identifies quality factors *ex negativo*, asking what actual problems within each factor can lead to poor performance quality (1994, p. 48). The factors are rhythm, intonation, incidents and mistakes, dynamics, musical expressiveness and shortcomings in the performance and in the staging effect. For each factor examples of problems are given that may lead to the formulation of quality criteria. Boerner (2002, p. 69-72) derives three “meta criteria” (my translation) for the interpretation quality from the two components of the public cultural task assigned to the opera houses in Germany: “interpretation diversity versus specialization” within the individual organisation and “interpretation conformity versus originality” within the totality of organisations from the task of promoting the repertoire; “interpretation modernity versus traditionalism” from the task of developing the repertoire. She sees the opera work as bidimensional, distinguishing between music and stage (Boerner 2004). For each dimension potential factors and outcome factors are identified. As to the musical dimension, *orchestra* is, for example, a potential factor that can be subdivided into instrument groups and again, within each group, into individual instruments. One example of outcome factors is *sound*, which can be differentiated into intonation, articulation, and dynamics. Problematic in this approach is the idea that these factors (both potential and outcome ones) can be considered criteria. According to the definition of aspect and criterion used in our research, what Boerner calls factors are often *aspects* and not *criteria*. In fact, if we say that we evaluate the dynamics of the orchestral sound, we only describe which part of the more general performance we judge, but we do not set any standard or principle according to which we judge it. That means that we evaluate an aspect without yet using any criteria. Nevertheless, Boerner mentions three important criteria for the evaluation of the performance quality: the congruity between all the factors at the different hierarchical levels up to the first order congruity between the musical and stage dimensions; authenticity, and the extent to which the recipient feels addressed by the performance (Boerner 2002, p. 105-106). Furthermore,

congruity can be divided at every hierarchical level in a conceptual-abstract component (i.e. specific tonal quality sought by the conductor) and a technical-concrete component (i.e. precise attack and instructions on dynamics for instrumentalists and singers). While for the technical-concrete component criteria are easy to be defined, the conceptual-abstract component is still very vague, even at this level of specification.

As to an example from the marketing management contributions, in a French study reported by Kotler & Scheff (1997, p. 190-191), “Quality of acting”, “Quality of production”, “the play”, “the text”, a “beautiful scenery”, “the message” and, through mentioning the opposite “difficult to understand”, the possibility to well understand are mentioned.

Very interesting insights into the aspects and criteria involved in the process of building a judgement are given by research in cognitive psychology. For example, Kleber uses semantic scales to let experts and lays evaluate some aspects of voice quality (Kleber 2002, p. 58-59). As to vibrato, he uses a scale ranging from strong to weak, and one scale ranging from pleasant to unpleasant. As to the timbre – or colour of sound – he uses 11 scales, the last three characterising the voice technique: light – dark, warm – cold, sharp – dull, rough – smooth, clear – raw, thin – full, radiant – not radiant, bright – not bright, open – throaty, free – pressed, open – covered. For the general impression – or evaluation, he uses a 7-degree scale ranging from good to bad. Through the factor analysis (p. 75-77), he identifies three factors for experts: power, technique and brightness; and three factors for laymen: power, sharpness and hardness. Kleber concludes that experts evaluate a voice as good if they perceive it as warm and bright (p. 89), while the perception of a bright or radiant voice by experts and laymen usually leads to a good general evaluation (p. 90). In addition, Kleber specifies some interesting attributes of the reception of vibrato, tremolo and triller that lead to the specification of criteria for these relevant aspects of the quality of classical singers’ voice (p. 30-35).

With regard to the cultural economics, also concerning performance quality this area contributes less to answering our research question, notwithstanding its strong interest in an operationalisation of this quality aspect. Throsby (1983; 1990) distinguishes between acting, dancing, singing, and playing of instruments to build the standard of performance; between direction, interpretation, choreography, conducting, and arranging to build the standard of production; and between scenery, props, costumes, and lighting to build the standard of design. Tobias only mentions the necessity of differentiating between the performance of the individual singers, the main idea of the staging and the scenography (Tobias 2003, p. 379).

As to the contribution to our research question coming from the sociology of music, music aesthetics and criticism, this is - as we expected - very rich, profoundly semantic but seldom systematic. This last attribute is present in Schick’s contribution. In the chapter on “Writing the Concert and Opera Review”, he formulates “A Summary of What Critics Consider” (Schick 1996, p. 141-144). What Schick calls generally “criteria” are divided in 6 main groups: “The Performer”, “The Performance” (divided in “General Criteria” and “Special Criteria for Some Individuals, Groups, and Genres”), “Programming”, “Extra-Musical Factors”, “The Audience”, “The Auditorium”. Concerning performance, we can see that Schick too presents more generally as criteria what we call *aspects* and *criteria*. The value of his summary is given by the many criteria – in our sense – presented for the musical aspect of the performance, like clarity of attacks and releases; presence of the appropriate contrasts (e.g. lyricism vs. drama); dramatic continuity, including transitions between themes, ideas and sections; projection of form; projection of harmonic change and structure; degree to which composer’s intentions are followed; appropriateness of the chosen instruments; authenticity of the score used, and so on. As to the specific criteria for an opera, the aspects of acting, ballet, costumes, libretto, lighting,

sets and staging are distinguished, but criteria are absent. Only for singers are some criteria mentioned, such as the breath control, the evenness of registers etc. With respect to acting, the projection of the feelings and drama of the text and the diction are the only criteria mentioned. No criteria for costumes, lighting, sets and staging, that is, for the stage dimension, are suggested.

The musicological discussion of criteria and aspects of opera performance quality deals above all with:

- authenticity of interpretation and/or staging (Märzendorfer 1977; Cerha, F., Hollmann, H. et al. 1985; Pachi 1985; Zehelein 1991, 1995; Harer 1992; Kolleritsch 1994);
- unity and consistency, or congruity, which are linked to intentionality and consciousness (e.g. Cerha 1985; Rienäcker 1995; Koch 2002; Hinrichsen 2003; Heister 2003);
- intensity (e.g. Heidbrink 2002) and expressiveness (Davies 2002);
- balance between musical and stage dimensions and role of singers (e.g. Adorno 1969; Heller 2002), with musical-stage differentiation not only limited to the orchestra (Dibelius 1972);
- phrasing, rhythm, dynamics and articulation (e.g. Adorno 1969; Harer 1992; Sparrer 2003);
- precision and accuracy in general (e.g. Adorno 1969) and with respect to rhythm, intonation and declamation of singers (Dibelius 1972);
- virtuosism (e.g. Marsoner 2002; Heister 2003);
- vitality, plasticity, colours precision (Dibelius 1972);
- the degree to which the performance makes clear what happens on the stage in terms of actions and emotions (Cerha, F., Hollmann, H. et al. 1985);
- originality (Eichel 1994);
- semantic definition and differentiation of the object opera in the three components language, music and theatre (Schmid 2002) or poetry, music and acting (Marsoner 2001);
- singing technique and its specific criteria (Vill 1995; Geck 2002).

As to the contributions coming from the empirical experience, analyses of rankings and reviews in the media have been conducted respectively by Boerner (2002, p. 116-120) and Boersma & Van Maanen (2003, p. 325-327). Boerner analyses the annual ranking made according to a nomination principle by experts between 1993 and 1998 for the opera magazine *Opernwelt*. She concludes that the empirical analysis proves the importance of congruity for the positive evaluation of the interpretation quality. Through the analysis of theatrical reviews in four daily papers, Boersma & Van Maanen show that cold expressiveness leads to a judgement of “underacting”, while an actress that receives a good evaluation has played with “full passion and with strong mimetic, textual and physical expression”. With regard to singing quality, a British critic discussing a choir and its singers praises “the unforced clarity of their diction in a dozen different languages [that] is as keen as if it were speech, and their intonation [that] is never less than perfect” (as cited in Smith 2002, p. 75).

As to artistic staff selection procedures, Lukas (1994, p. 149-150) identifies criteria for singers and conductors, distinguishing between technical and personality criteria. One example of opera-internal discussion about quality is given by the *Staatsoper Unter den Linden* in Berlin (2002, p. 8-10), which differentiates itself through its “dunklen deutschen Traditionsklang” (dark German traditional sound), aiming at making it “smoother” and “softer”, while the brass sound should be “bright and full”. The woods are “warm” and the general orchestral sound has been “opened” through the conductor (my translations). The dynamical range and the sound differentiation range of the orchestra is reported to have grown. Works from the pre-classic and the baroque era are to be performed authentically but with elan and fantasy. As to audience

surveys, again Boorsma & Van Maanen (2003) used among other items the following for an audience survey on the reception of a theatre performance: traditional performance, innovative theatre, experimental theatre, being art, being challenged to see things differently, touching, confronting, excellence of cast performance, being well acted and well directed, appropriate scenery and costumes.

Even if musical competitions usually involve soloists or small groups, there are some examples that address opera ensembles and orchestras. Tremblay (2004, p. 67) reports on the participation of the Stuttgart Opera House in the "Prague Quadrennial" 2003 with the recognition of "a technique that forms the very basis and therefore the prerequisite for those changes and amendments necessary to make today's living theatre possible: the design and realization of scenic space that anticipates future developments by the keeping alive of past developments in the very creation of the present". The evaluation game of two German associations of brass music (BDB & BVBW 2002) addresses brass orchestras. The experts' jury judges the musical and instrumental level of the different groups. The following 10 criteria are used to evaluate the musical performance: tuning and intonation, sound culture and quality, phrasing and articulation, technical execution, rhythm and congruity between the groups, dynamics and sound balance, time and change of time, interpretation and style adequacy, piece chosen in relation to the formation and capacity of the orchestra, general artistic impression. For each criterion a 5-degree scale from excellent to not sufficient is used. A score is assigned to each degree in order to be added and build a total score out of 100 points.

As we have said in the introduction, quality evaluation practices are important for funding decisions. From the point of view of a foundation (Gehrig 1993, p. 339-340), some questions for the evaluation of performance quality are: "Is a product or a presentation technically well produced? Is it meant to be? Are the lights strong enough so that the audience can see the action? From the back of the hall, can one hear the actors speaking? Is the design exciting, and does it support the work? Are the performers appropriate for the style of material? Do they act and sing convincingly according to the artist's intentions? [...] Does the piece exhibit craft, if craft is important? Is the piece culturally specific?" (p. 339), "Does the artistic work ring true? Does it have a power that reaches out respectfully to the viewer, the participant, and the audience member? Is there an honest search on the part of the artist and the artistic production for a dialogue with the receiver? [...] Is the piece derivative? Is it innovative? Is it challenging? Does a work lecture, or encourage debate? Does a piece make one struggle, or does it wash over a person like a fresh rain?" (p. 340). As to governments, the French Culture Ministry evaluates the interpretation (Urrutiaguer 2002, p.193), and the Dutch *Raad voor Cultuur* (2004, p. 206-223), which traditionally bases its funding decisions on quality criteria, doesn't offer a very satisfying insight into the specificity of performance quality. Apart from inconsistent or mediocre production quality, which justifies negative decisions, or vague and general formulations like "high level innovative musical theatre", "outstanding quality of productions", "continuous performance quality" and "surprising productions" with a "special and unique approach to musical theatre" (my translations) – to indicate a trend against traditionally pretentious productions – that lead to positive funding decisions, we can notice in only one case a judgement distinction between the level of direction and dramaturgy.

Main Findings and Further Research Plan

The interdisciplinary literature research has shown that very few contributions respond directly and systematically to the question of identifying the main factors forming the current conception of quality in opera houses. Nevertheless, in some projects conducted in research areas that could appear at first far from the semantic problematic of the opera artistic object, such as research in leadership and cognitive psychology, attempts to operationalise and describe the artistic quality have been made. The most evident problem of the operationalisations used is the lack of consideration of the many actors and disciplines involved in the evaluation of the artistic quality of opera houses. No attention is paid to the issues of transparency and agreement. Even more problematic is the missing or insufficient confrontation with the musicological discussion. As to the contributions coming from the sociology of music, music aesthetics and criticism, they are rich, profoundly semantic but seldom systematic and complete. According to the purpose of our research, no new instrument has been developed so far from the very specific and interdisciplinary point of view of the arts management. Generally, while for profile quality operationalisations are possible according to the goals of the individual cultural policy, for performance quality, which is definitely more intangible and difficult to evaluate, the creation of qualitative, semantic indicators would already be a high achievement.

The most systematic attempt to create a framework for the evaluation of artistic quality in opera houses in its completeness, including both profile and performance quality, has been made by Boerner (Boerner 2002). The objective of her research was the development of an explanation model for the directive management style in opera houses. What she calls “definition” (Boerner 2004) of artistic quality for opera houses was necessary as a basis for the evaluation of the results of different management styles and has the same meaning as what we call *conception* of quality. This difference is not only formal. In fact, while we want to build a framework that pays attention to the subjectivity and the dynamics of the evaluation of artistic quality by analysing and integrating the factors forming the *current* conception of artistic quality in the widest and most interdisciplinary way and giving a central role to the musicological aspects, the word “definition” seems to assume that it can be said with certainty what quality is, an approach which seems inherently problematic. Although Boerner specifies that she doesn’t want to make a contribution to musicology and aesthetics (Boerner 2002), the concept “definition” could be misleading. Finally, as we have seen, the choice of specific criteria for a framework is definitely a decision that involves musicology.

As Boerner’s final aim is to measure the effectiveness of artistic leadership, her work is more concerned with identifying the hierarchical stages and the staff qualities involved in delivering the performance than in identifying the factors evaluated by a potential recipient. This can explain why some important performance quality criteria have been missed. Two significant examples are the degree to which the audience understands the action on the stage and the expressiveness of the musical and dramatic performance. Nevertheless, for her “definition” of artistic quality in opera houses she has used important sources from the area of music and theatre aesthetics and applied a deep knowledge of the processes in opera houses leading to a very well structured result. Thus, her work will be used as basis for the development of our framework.

The contribution that most specifically seems to answer our research question from the semantic point of view concerning the performance quality and that originates from a profound personal knowledge of the music world is made by Schick (1996), a pianist and professor of music aesthetics and criticism. The criteria contained in his summary will be built up into the musical dimension of the framework.

With regard to singing quality, Kleber's results (2002) will also be integrated into the framework in order to specify the vocal dimension. Further literature in cognitive psychology will be reviewed in order to search for similar contributions with respect to the more general musical and stage dimension.

Finally, for each criterion and aspect included in the framework a musicological validation – what we call theoretical validation – is required. This is obtained through the analysis of the current musicological discussion in its completeness in order to come up with a balanced explanation of the individual aspects and criteria, which must be clear and thus adequate to be also used for the practical objectives of our wider exploratory study (Chiaravalloti 2005). While the aspects to be considered are somehow inherent in what we want to evaluate and thus often universally acceptable, criteria are the result of a tradition and are continuously subject to critique and review. In this sense, when we decide to include a criterion in a framework for the evaluation of artistic quality, we definitely make a choice that concerns musicology. Thus, the criterion must be theoretically validated through the current musicological discussion. In addition, the literature research so far makes it clear, that for a complete framework for the evaluation of the individual performance, a confrontation with the respective composition is required.

After the theoretical validation, the new framework will, through a descriptive survey involving artists and audience, receive the practical validation necessary in order to deliver an innovative result that will set the standards for further research in performance management for performing arts and for the social sciences interested in the evaluation of the artistic quality of opera houses.

Acknowledgements

I wish to warmly thank my dear friend Martin Rodden for the generosity and patience shown in his proofreading and amending of the language of my paper.

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