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A Bright IDEA: Assessing Stakeholder Impact of Social Sustainability Strategies

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Abstract

The performing arts industry is experiencing an awakening in terms of the need to integrate inclusion, diversity, equity, and access (IDEA) into their practices. This is the result of calls for change in the industry from members of historically marginalized communities. The challenge is that in order for social sustainability strategies like IDEA to be effective, they need to integrate them into the organization's culture (Serafeim, 2020). IDEA cannot be a checklist. Using stakeholder theory and resource-based view as theoretical foundations, this qualitative case study examines one exemplary organization that has differentiated on social sustainability for decades. In 27 open structured interviews and an examination of organizational documents and social media, this study sought to understand why IDEA was adopted, how it was implemented, and what the impact of the strategy is on the most salient stakeholder group, audiences (customers).

Several interesting external and internal factors leading to the adoption of IDEA were revealed. Successful incorporation of this strategy was achieved through leadership, organizational culture, and organizational structure. Three levels of outcomes were revealed: Organizational, Individual, and Societal. Finally, this organization has developed five core competencies that have led to a competitive advantage. They are storytelling, artistic risk-taking, building partnerships, stakeholder relationship management, and social sustainability. This study can be used as a guide for organizations in assessing their organization's readiness for the adoption of social sustainability strategy and can be a foundation for future work in developing assessment tools to understand the impact social sustainability has on stakeholders.

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Keywords: Social Sustainability, IDEA, Inclusion, Diversity, Equity, Access, Performing Arts

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CHAPTER 1

Developing the business case for sustainability is an evolving process and is often thought of as finding a solution to a social or economic problem and creating economic value with it. Sustainability is commonly defined as meeting the needs of today without compromising future generations' ability to meet their needs (Brundtland, 1987). As a strategy, sustainability is intended to positively impact the triple bottom line of a company. These strategies address economic, social, and environmental goals simultaneously. Most existing research aims to tease out the effectiveness of these strategies and focus on the economic part of the equation. Shareholder value, annual profits (Stanwick & Stanwick, 1998), stock market performance (Ziegler et al., 2007), Tobin's Q (Luo & Bhattacharya, 2006; Wagner, 2010), and return on investment (Luo & Bhattacharya, 2006) have all been used as measures. The challenge in using these metrics is that they do not evaluate the value created for social and environmental beneficiaries.

Additionally, much work has been done to identify the environmental impacts of sustainability strategies. Environmental sustainability can be measured by examining carbon emissions, impacts on wildlife, and the quality of our water and soil supplies (Acquaye et al., 2017; Acquaye et al., 2014; Ballantyne et al., 2011; Hester & Little, 2013). Very few studies have looked at societal sustainability at all. Further, no studies have explored societal sustainability in the not-for-profit performing arts realm.

In 2015, The United Nations identified reducing inequalities as one of its 17 sustainability goals for 2030. Inequitable circumstances most severely impact indigenous people, people with disabilities, and children at risk of being left behind. Many of the studies focused on measuring the impact of reducing inequities occur in emerging

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economies (Ehrgott et al., 2011; Malik & Abdallah, 2019; Mani et al., 2018). There are significant structural issues impacting the ability to create a level playing field in the United States as well (Dupree & Boykin, 2021; Feagin & Bennefield, 2014; Schmidt, 2005). Strategies aimed at addressing these particular social issues are well-placed in a developed and well-studied economy like the United States.

One can see the impact of inequality in the United States in the Black Lives Matter (BLM) movement that gained momentum with the murder of George Floyd in May 2020 (Chase, 2017; Wu et al., 2021). This movement led to a call to action for American Theatres in a document titled, “We see you White American Theatre” (WSYWAT) (*BIPOC Demands for White American Theatre*, 2020). This, in combination with the global pandemic that brought the performing arts industry to a literal halt (History.com), has resulted in both time and space for anti-racism work in the theatrical industry across the United States. The result of that work is publication of Equity, Diversity, and Inclusion (EDI) plans for a large swath of theatres. The challenge becomes that many organizations treat EDI as a list of items to check off as complete (Serafeim, 2020). Checklists for companies prior to WSYWAT looked like this:

- Do we include a performance about people who identify as Black, Indigenous, and People of Color (BIPOC) as part of our season annually in February?
- Do we cast a couple of color in musical ensembles?
- Are photos of the BIPOC couple all over our promotional materials?

Checklists for companies post-WSYWAT look like this:

- Do I have people who identify as BIPOC on my board?

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- Is my organization promoting people who identify as BIPOC into leadership positions?
- Have we put out a statement condemning racism and supporting the BLM movement?
- Have we created a committee to examine our policies for racism?

To be fair to the theatrical industry, conversations regarding the lack of diversity within the industry both in terms of race and gender appeared before WSYWAT (AEA, 2020). The performing arts industry had already identified that a problem existed. WSYWAT accelerated the change that is desperately warranted. The argument here is not whether we should be working through this list. Engaging in these conversations is exactly what the industry should be doing. It is what has been asked of us. The argument is that the activities being engaged in to combat these critical issues remain... a checklist. This type of approach does not lead to the type of earnest change that needs to happen within the culture of an organization for it to be truly effective and outwardly recognizable (Serafeim, 2020). In order for EDI to be an effective strategy for social sustainability, we need to understand how performing arts organizations have integrated diversity into their strategy, organizational processes, and culture.

Why is this type of strategy adopted? How does it become part of the culture over time? How do we know if an integrated diversity strategy is working? How do organizations measure it? Those are great questions and critically understudied. The actual impact of social sustainability strategies on stakeholders is not clearly understood (Büyüközkan & Karabulut, 2018; Furtado et al., 2021; Schaltegger et al., 2019).

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Stakeholder theory provides the theoretical foundation of this study. It tells us that firms have a responsibility to provide value to more than just investors (Freeman, 2010; Freeman & Reed, 1983). Key stakeholders such as employees, and local communities, among others, have a variety of expectations with regard to the behavior of organizations and the impact of their actions on the world (Yang & Malone, 2008). We can see that in the calls for change within the performing arts industry through WSYWAT. The organization's ability to do what is being asked results in meeting expectations for stakeholders. In turn, that should improve the triple bottom line for the organization.

The first step in developing a stronger understanding of the development of an integrated diversity strategy is a qualitative study with a focus on an integrated diversity strategy (i.e., IDEA new acronym for Inclusion, Diversity, Equity, and Access) to answer the following research questions:

1. Why was the IDEA strategy adopted?
2. How was the IDEA strategy implemented?
3. What is the impact of this integrated IDEA strategy on a salient stakeholder group (e.g., audiences)?

These questions are the focus and framework for this study. This study focuses on one specific performing arts organization that has integrated an IDEA strategy into its business strategy, and culture, and is strategic about implementing IDEA throughout the organization and has done so for the entirety of its forty years. Given the calls for change within the industry, the time is right to understand the how and why of the development of this integrated IDEA strategy, which has contributed to the financial viability of this performing arts organization while increasing social sustainability.

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Creative Stages, a pseudonym, is an over-40-year-old performing arts organization located in a major city on the Eastern seaboard. Like most professional theatre companies across the United States, Creative Stages is organized as a not-for-profit corporation (NFP). In contrast to the commercial side of the industry (e.g., Broadway, National Tours, Disney) with a primary goal of generating profits for investors, this company exists to carry out their mission, which is to empower all young people to discover their voice and identity through performing arts education and professional theatre. This company operates on a \$4.9 million annual budget. The company was formed in 1979 as a response to a lack of performing arts education opportunities for young people in the region. The professional theatre part of the organization was added several years later. Originally housed in a storefront in a local mall, the company made the move to its new building in 2003. The 50,000 square foot structure that includes classroom spaces, dance studios, a 142-seat black box theatre, a 364-seat thrust theatre, office spaces, a café, and costume and scenic shop spaces was built into the side of an existing parking garage downtown.

Diversity, Equity, and Inclusion are built into the value system of Creative Stages and the organization has a long-standing history of acting on and investing in those values. Authentic storytelling is very important to the organization and the company seeks out playwrights and artists with backgrounds that match the story being told to be involved in the creation and production process. For example, when the company commissioned a musical based on the life of a Latinx sports hero, they specifically sought a playwright and composer team of Latinx descent to tell the story. Further, there is a character with a disability intentionally written into the musical and the organization

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chose to cast an actor with the same condition in the role in 2008 well before calls for authenticity were widely made.

Additionally, the company provides arts education programs for students of all ages and ability levels. Classes in dance, character creation, storytelling, acting, video, and musical theatre are a regular part of the organization's programs. The company is intentional about serving underrepresented communities in terms of disability and socio-economic status. They boast a department of inclusion that serves the diverse needs of students, employees, and audiences that have been in place for the past 15 years. All performances are American Sign Language (ASL) interpreted, audio described, assistive listening devices and large print programs are available, and sensory-friendly performances and bilingual (Spanish/English) performances are regularly scheduled. The spaces are fully accessible, and the organization set up an additional NFP in a neighboring jurisdiction to be able to serve underprivileged youth in that area.

It is important to note that any strategy adopted needs to remain flexible to changing environments (Nwachukwu & Vu, 2020). Our societal understanding of what should result from a company adopting a strategy based on IDEA was very different 40 years ago than it is today (Mead & Paige, 2008). This company has been ahead of the IDEA curve in terms of what it has done throughout its history and continues to change and update its own policies ahead of mandated actions. For that reason, this organization provides a very good platform on which to study the implementation and development of an integrated IDEA strategy.

Stakeholders in this context come in all stripes (e.g., audiences, students, parents of students, contracted artists, leadership, employees, and board members). For this

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study, we explore the most salient stakeholders (e.g., board members, executive leadership, and audiences or customers). Essentially, the organizational decision-makers and the audiences are included since they make decisions that have positively influenced financial performance, thereby, allowing the organization over the past four decades to grow the range of their programs and offerings so that they reflect changing social realities to engage target audiences. The expectations that stakeholders have of the organization with an integrated IDEA strategy will likely vary depending on the stakeholder's role within the organization itself and personal experiences that led to the choice of engaging with this organization instead of other alternatives. The results of this study will provide a baseline for understanding the adoption and implementation of a social sustainability strategy, IDEA, by executive leadership and its impact on a salient stakeholder group (e.g., audiences).

Summary

To conclude, there is a need to create a measurement tool for social sustainability strategies. Additionally, the call within the performing arts industry for change in the area of IDEA provides a good opportunity to examine how social sustainability strategies are fully integrated into a performing arts organization and how they impact stakeholders. In the following chapter, an examination of the current state of the literature provides a foundation for developing this study.

CHAPTER 2

Literature Review

Sustainability

Our Common Future marks the beginning point in covering a new concept, sustainability (Brundtland, 1987). In it, the author calls for international cooperation and industry, writ large, to engage in behaviors aimed at moving our world forward to protect our natural resources, reduce poverty, and be the good that we hope to see in the world. He defines sustainability as development that meets the needs of the present without compromising the ability of future generations to meet their own needs (Brundtland, 1987). This is a call to action to recognize the impact that we will have on the future and reign in the practices that have led to the physical destruction of our planet and the grossly inequitable circumstances within which many of its residents reside. There are three interconnected parts to sustainability: environment, society, and economics. We begin to see steps made to address and define these issues in an uneven fashion.

Measuring Sustainability Performance

Sustainability performance evaluation (SPE) can be defined as quantifying an organization's performance based on decisions, actions, and policies that lead to results in economic, environmental, and social categories (Büyükozkan & Karabulut, 2018). Because of the interrelated nature of the three components, we need a way to assess the overall impact of sustainability initiatives. Currently, this assessment mechanism does not exist (Lobos & Partidario, 2014). The landscape within which they are applied is complex. The need to use a holistic approach is clear and difficult to tease out (Büyükozkan & Karabulut, 2018).

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One part of the sustainability triad is well on its way to being easily measured, the environmental arm. There are several metrics currently used that are commonly reported by corporations that define the environmental impact. Those are ISO Standards, Carbon Disclosure Project, Global Reporting Initiative, and Stock Exchange Sustainability Indices. The challenge with these reporting tools is that they do not offer the kind of integrated analysis necessary to form a clear sustainability assessment picture. They partially cover impact, lack accountability, over-simplify, and can be very subjective. Overall, companies can pick and choose what they want to report and how in terms of impact. This fact reinforces the need to, at some point, be able to look at all three arms together.

There are several challenges that we need to overcome in moving toward a fully integrated assessment tool. Among those are the need for a balanced SPE approach that incorporates all three areas of impact, specific and practical applications, consideration that all three areas are interdependent, multi-criteria measurement, the need to address qualitative data in the results, and common terminology for outcomes (Büyüközkan & Karabulut, 2018). These are areas of opportunity for further development and research. This study aims to address some of the needs identified by exploring the outcomes of a specific social sustainability strategy (i.e., IDEA).

Social Sustainability

Social Sustainability (SS) addresses the social arm of the triad and is the umbrella under which strategies like IDEA fall. As laid out in Table 1, ideas on defining social sustainability diverge dramatically and, at present, the literature in this area remains emerging.

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Table 1*Defining Outcomes of Social Sustainability*

Authors	Title	Outcomes
(Campbell, 1996)	Green cities, growing cities, just cities? Urban planning and the contradictions of sustainable development	Resource, Development, Prosperity
(Sachs, 1999)	Social Sustainability and Whole Development: Exploring the dimensions of sustainable development	Equity, Democracy, Social Homogeneity, Equitable Income, Access to resources and social services
(Hans-Böckler-Stiftung, 2001)	Pathways Towards a Sustainable Future	Meeting Basic Needs, Social Security, Equal Opportunities to Participate, Social Innovation
(Thin et al., 2002)	Conceptualizing Socially Sustainable Development	Social Justice, Solidarity, Participation, Security
(Chiu, 2003)	Social Sustainability and sustainable housing	Equitable distribution of resources and opportunities, social limits, equality
(Godschalk, 2004)	Land use planning challenges: Coping with Challenges in Visions of Sustainable Development and Livable Communities	Livability, Economic Growth, Ecology, Equity
(Baines & Morgan, 2004)	Sustainability Appraisal: A Social Perspective	Meeting basic needs, overcoming disadvantage from disability, Personal and social responsibility, Social Capital, Civil Society, Equitable distribution of opportunities, Diversity, Tolerance, Empowering People
(Bramley et al., April 2006)	What is 'Social Sustainability' and How do our Existing Urban Forms Perform in Nurturing it? Strengthening the 'Social' in Sustainable Development: Developing a Conceptual Framework for Social Sustainability in Rabid Urban Growth Region in Australia	Empowerment, Interaction, Participation, Pride, Stability, Security
(Cuthill, 2010)	Framework for Social Sustainability in Rabid Urban Growth Region in Australia	Social Infrastructure, Social Capital, and Social Justice and Equity
(Sutherland et al., 2016)	The Role of Manufacturing in Affecting the Social Dimension of Sustainability	Social indicators and frameworks, effect of manufacturing on social performance, social life cycle assessment methodology, integrating social, environmental, and economic consideration
(Gregori et al., 2017)	Digital Manufacturing Systems: a framework to improve social sustainability of a production site	Occupational health and well-being of workers

The jumping-off point for defining social sustainability seems to have found its roots in urban planning and development. In 1996, Campbell began defining issues of social sustainability in terms of resources, development, and prosperity overall. Campbell did this within a larger context of sustainable development overall without going into great depth in terms of the meaning behind these individual characteristics. Sachs added

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aspects of equity, democracy, social homogeneity, equitable income, and access to the mix in furthering the definition of outcomes (1999). Her explanation allows us to understand sustainability as a process rather than an absolute. Sustainability continues to evolve as the human imagination of projects and living conditions evolve. Goldschalk (Goldschalk) rounds out the basic needs argument in sustainability by looking at it through the lens of conflicting ideas and opening the door for discussion in other areas. He contrasted the need for economic growth, ecology, and equity in urban planning with residents' needs for livable cities.

From this point, social sustainability takes a turn for the quality of life itself and ideas emerge such as equity, social justice, diversity, and empowering people (Baines & Morgan, 2004; Bramley et al., April 2006; Thin et al., 2002). The timing of this transition is particularly interesting because it comes just after the first publication of the United Nations Sustainable Development Goals in 1999. The change in academic conversation also paves the way for movements like BLM in the United States.

Building on these initial attempts at definition, Vallenge, Perkins, and Dixon (2011) suggest that there are three types of social sustainability strategies, namely development social sustainability, bridge social sustainability, and maintenance social sustainability. These types are differentiated by the goals that they hope to address. Development social sustainability can be examined on a scale of tangible to intangible and is often equated with social capital, social cohesion, and social exclusion. Bridge social sustainability can be examined on a scale from non-transformative, like recycling initiatives, to transformative, which challenges individuals to rethink their relationships

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with other humans and non-humans. Maintenance social sustainability deals with whether people's attitudes toward issues of sustainability change or do not change over time.

From here, the conversation has begun to take hold in the realm of supply chain and manufacturing. The health and well-being of workers, social performance, social life cycle, and the integration of economic, environmental, and social factors of performance build the foundation for what social sustainability looks like in this sector (Gregori et al., 2017; Sutherland et al., 2016).

One cannot discount the basic needs argument set forth by early theorists in the area, nor can one neglect the humanity behind the shift in the conversation. The common thread here seems to be providing for the well-being of all people in all of its varied forms and defining factors. The definition that we adopt for this study is *social sustainability supports stakeholder well-being and health*.

Corporate Social Responsibility

Strongly connected to the idea of social sustainability is corporate social responsibility (CSR). The concepts are converging (Montiel, 2008). Both bodies of research define sustainability in terms of meeting the triple bottom line initiatives. The major point of divergence between the two is where the environmental construct is located. For corporate sustainability, businesses need to address economic prosperity, social equity, and environmental prosperity before they can say they are behaving in socially responsible ways or with integrity from an environmental perspective. In CSR, the environment acts as a subset of social performance.

The trajectory of how we currently define CSR starts in 1953 with Bowen laying out the obligations of businesses to make decisions that align with the values of society.

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From that point forward, social movements push research agendas and legislative activities, which in turn, encourage business in the general direction of doing better for society. People have the power to insist that businesses behave better. Social movements to address environmental and labor concerns in the 1950s and 60s pushed researchers to more closely examine the goals and ethical strategies of business (Agudelo et al., 2019). Frederick laid out a new theory of business that says there are 5 components to what businesses should do (1960). They are 1. Produce in ways that enhance socio-economic welfare. 2. Manage in ways that align with current research. 3. Recognize that current systems are based on history and long-standing cultural traditions. 4. Individual businessmen play a social role that is sometimes inconsistent with their own ideals. 5. Deliberate and conscious choices drive socially responsible business behavior. That behavior is not accidental.

As a response to the recession and growing grassroots social movements, the US federal government began to implement regulations to help address these concerns in the 1970s. The Environmental Protection Agency, Consumer Product Safety Commission, Equal Employment Opportunity Commission, and the Occupational Safety and Health Administration are examples of agencies that were put into place to begin to formalize businesses' responsibility for social issues. While there was some backward traction amongst academics (Preston & Post, 1975), the trend toward CSR continued when Sethi suggested that corporate behavior should be required and align with social norms, values, and expectations (Sethi, 1975). The 1970s ended with the first formal definition of CSR, "The social responsibility of business encompasses the economic, legal, ethical, and

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discretionary expectations that society has of organizations at a given point in time” (Carroll, 1979).

The 1980s and 1990s saw the operationalization and globalization of CSR. CSR became a decision-making process that influenced corporate behavior (Jones, 1980). New social concerns revolving around nuclear disasters, discriminatory practices, quality of work life, and employee health and safety again drove the development of this concept (Carroll, 2008). In terms of globalization, we began to see multinational corporations in positions where they had to deal with differing standards across borders (Carroll, 2015). Wood put forth a more robust and unified theory built upon legitimacy, public responsibility, and managerial discretion as the principles of CSR (1991). Further, she defined a process consisting of environmental assessment, stakeholder management, and issues management. Finally, she defined outcomes as social impacts, social programs, and social policies. She also said that business leaders needed to balance their responsibilities to shareholders with their responsibilities to other stakeholders. Also during this decade, dimensions of strategic CSR were identified and it was argued, if applied, would lead to economic benefits for the business (Burke & Logsdon, 1996). Finally, the concept of the triple bottom line came into existence (Elkington, 2018). The idea behind the triple bottom line is that sustainability measures are intended to positively impact social, environmental, and economic targets.

The 21st century brought with it new international partnerships designed to address issues of social sustainability, namely the 17 goals for sustainable development put forth by the United Nations. Reducing inequalities within and among countries is one of the Sustainable Development Goals (SDG 10). IDEA strategies aim to do that. While

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some scholars view the performing arts as a dying institution (Baumol & Bowen, 1993), others note that these organizations can play an influential role in promoting social integration by addressing the diversity issues prevalent in society at present (Bagley & Castro-Salazar, 2012).

Diversity

In 1998, Wentling and Palma-Rivas predicted a future that included a very diverse workforce due to globalization, that initiatives relating to diversity would make their way into organizational strategic plans, and that the effectiveness of those programs would be measured. At this point, we begin to see firms adopt strategies that address the need to grow diversity both inside the organization itself and the people that the organization serves. We also begin to see the need to study the impact that diversity has on the overall business model.

Step one here is to define the different types of diversity that can be explored. One study posits that diversity exists within two primary contexts, surface-level and deep-level diversity (Roberson et al., 2017). Surface-level diversity is viewed in terms of gender, race, and disability status. This information is typically collected by Human Resource departments at the time of application or hire. Deep-level diversity is defined in terms of psychological characteristics including attitudes, values, and personalities (Harrison et al., 2002). While both may influence firm performance metrics in different ways and at different levels, this paper focuses on issues of surface-level diversity.

Studies of surface-level diversity and firm financial outcomes vary in terms of results. One study in the banking industry found that firms with racial diversity and growth strategy perform better on productivity, profitability (measured as ROE), and

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market performance than firms that do not (Richard, 2000). Another study of small to medium size German companies found that age diversity was negatively related to firm performance because of the perception of discrimination (Kunze et al., 2011). A study of retail outlets found that gender and racial diversity had no impact on sales and that age diversity negatively impacted sales (Leonard et al., 2004). A comparative study between Chinese firms and Western-located firms found a significant relationship between profitability and age diversity when firms were located in the West (Li et al., 2011). Small businesses were explored and it was found that firms with a more culturally diverse workforce had a greater positive change in revenue and net income than those with less diversity (Hartenian & Gudmundson, 2000).

From a board and executive perspective, one study found that there are limits to the value of diversity, specifically, in complex strategic circumstances and, in fact, in stable environments, board diversity may be a hindrance in financial performance metrics (Van der Walt et al., 2006). Others have found a positive relationship between the percentage of women and BIPOC on boards and firm value (Carter et al., 2003).

Likewise, studies of non-financial outcomes also vary significantly. A meta-analysis found a significant positive relationship between team demographic diversity and team performance (Wei et al., 2015). Another meta-analysis found that racial and gender diversity has a small and negative relationship with team performance (Bell et al., 2011). A third meta-analysis found that homogeneity in groups improves performance in low-difficulty tasks but performance benefits from dissimilar groups in high-difficulty tasks (Bowers et al., 2000). Finally, task-related diversity positively impacts both the quality and quantity of team performance (Horwitz & Horwitz, 2007). Outcomes beyond

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group performance continue to defy the standards of logic that we so hope are the result of this work. Racial, ethnic, and gender diversity may improve morale (Jehn et al., 1999), but team diversity has no impact on social integration (Horwitz & Horwitz, 2007). Finally, as similarity increases, benefits like creativity decrease (Bell et al., 2011).

Given the mixed bag of results on the impact of diversity on financial and non-financial performance in organizations, clearly better understanding of strategies and management systems to drive diversity in organizations is necessary to capture some of the benefits from it.

Diversity Management Strategy

In order to address the lack of diversity in many areas, organizations and legislatures have begun setting goals in these areas. Multiple approaches have been taken by companies to address their diversity goals. For some, legislative initiatives such as Affirmative Action (AA) and Equal Employment Opportunity (EEO) have been the driving force behind meeting goals. Others have taken a self-directed approach to implementing a diversity management program (DM). We have a fair bit of research to help our understanding of the impact that AA, EEO, and DM programs have on both the levels of diversity in an organization and employee attitudes toward these programs (Furtado et al., 2021). AA and EEO programs seek to correct wrongs done to underrepresented communities by mandating specific percentages of members of these communities into positions. EEO is commonly seen as the precursor to AA. These programs are supported by the federal government and their goal is to prevent workplace discrimination and remove access barriers to members of underrepresented communities.

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DM programs are less stringent in their implementation and rely on the idea that a diverse workplace is a happy workplace and organizational success results.

AA and EEO programs are more likely to hit their diversity targets than DM programs, but employee attitudes toward such initiatives are more likely to be negative for several reasons, namely, not seeing the need for these programs, not perceiving racism in the workplace, and a perception of equity (Furtado et al., 2021). What is the key to integrative and effective diversification of companies and how do we replicate that?

Diversity Climate

Diversity climate may be a key piece of the puzzle that determines the degree to which diversity within an organization provides the outcomes that we hope to achieve (Cox & Blake, 1991; Kossek & Zonia, 1993; Mor Barak et al., 1998). A diversity climate is defined as employees' shared understanding of the consequences of workplace discrimination and harassment (Chin, 2009). If the behavior is tolerated, the diversity climate is negative. If it is not tolerated, the diversity climate is positive. This distinction becomes important in the IDEA strategy conversation and offers beneficial outcomes. Positive perceptions of organizational inclusion climate are shown to reduce turnover intention (Kaplan et al., 2011; McKay et al., 2007).

The literature surrounding diversity climate has not yet met a critical level of acceptance of meaning and measurement (Cachat-Rosset et al., 2019; Goyal & Shrivastava, 2013). Diversity climate itself has several characteristics to consider when trying to define an individual organization's climate: The level of commitment to diversity by an institution, the way in which diverse groups perceive the level conflict and acceptance of others, fairness, and respect (Garcia & Hoelscher, 2010).

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Connectedly, organizational culture is a common set of behavioral expectations that reflect the values of an organization and define the appropriateness of attitude (Martin, 2001; Schein, 1985). The culture of the organization itself, in terms of how diversity is approached, also impacts the success of its integration into business practice (Spataro, 2005). There are three main approaches. First, a culture of differentiation divides people by whether they belong to a specific group or not. Second, a culture of unity suppresses differences for the greater good. Finally, a culture of integration, the most difficult culture to cultivate, highlights and brings out differences. The culture of integration is aspirational because it provides the greatest benefit for differences within an organization and provides the greatest opportunity to achieve the benefits of a diverse workforce. Another study goes on to say that in circumstances where individuals see value in diversity, they are more likely to place value on diversity within groups (Van Knippenberg et al., 2007).

We can further refine our argument that the right organizational culture is critical to the success of IDEA strategies by pointing specifically to companies that have adopted inclusive practices and standards of behavior into that culture.

Organizational Inclusion

Organizational inclusion is a necessary condition for organizations that hope to reap the benefits of innovation and creativity from the diversity that they seek (Nkomo & Al Ariss, 2014). Inclusion is achieved through repeated meaningful interactions with members of communities unlike one's own (Bernstein et al., 2020). The very term inclusion assumes exclusion exists. This idea becomes important because proximity to those unlike us is not a predictor of true inclusion. Even in the literature on mixed-income

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housing communities, studies find that for the most part, interactions between varying levels of income are surface-level at best and individuals migrate to social clusters of individuals like themselves (i.e., people from lower socio-economic backgrounds prefer to socialize with people from similar backgrounds and vice versa) (Brophy & Smith, 1997; Ellickson, 2009; Joseph et al., 2007; Stearns et al., 2009). Studies of higher education institutions tell us much the same thing (Halualani, 2008; Stearns et al., 2009).

Shore et al. (2011) put forward a framework for inclusion that measures the value and experiences of individuals for both belongingness and the value placed on the uniqueness of the individual within the organization. In it, belongingness describes how the individual feels in terms of group activity and value in uniqueness describes the way in which the organization views the diversity of individuals. This becomes important in understanding how sustainability strategies impact individuals.

Exclusion occurs when individuals feel low levels of belongingness and there is a low value placed on uniqueness by the organization. This can lead to negative emotional, health, behavioral, and cognitive outcomes (Baumeister et al., 2005; Blackhart et al., 2009; DeWall et al., 2009). It may also lead to higher levels of turnover intention despite the value that unique individuals bring to the proverbial table (Shore et al., 2011).

Assimilation occurs when there is a high level of belongingness but the organization places low levels of value on uniqueness (Shore et al., 2011). In this case, unique individuals take on characteristics of the dominant group and conform. People may choose to hide unique characteristics about themselves so that they can better fit into the larger group (Goffman, 1956). Both women in law firms and BIPOC men in

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executive positions have been found to adopt behaviors and styles of dress in order to align with the values that the organization puts forward (Anderson, 2011; Ely, 1995).

Differentiation occurs when an individual feels like they do not belong, but the organization sees high levels of value in the uniqueness of the person and views their contribution as critical to the work being done. In this case, both appropriation and exclusion can undermine an organization's outward decree of valuing diversity resulting in commercialization and further marginalization of individuals (Tyler & Vachhani, 2021). This concept can also result in tokenism. In 1977, Kanter first described the concept of tokenism as a subgroup in the workplace comprised of less than fifteen percent of the total organization where the dominant culture reigns (Kanter, 1977, 2008). The results of this are numeric skewness of the workgroup. In this particular study, women worked as salespeople in a male-dominated field. At the time, salespeople were overwhelmingly male. These women described feelings of standing out, isolation, and being encouraged to act in gender-defined ways. While groundbreaking, there has been criticism of her work, specifically, because of her overall focus on the numbers behind it all. She neglected to explore organizational and societal sexism as a potential for why women felt this way in the workplace (Zimmer, 1988). Inclusion occurs when both high levels of belongingness and high value on the uniqueness of individuals are present.

Organizational Inclusion and Stakeholder Outcomes

The outcomes of multiple meaningful interactions with people unlike oneself may lead to equity, social justice, higher organizational and group performance, and higher

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levels of skill (Bernstein et al., 2020). Literature in the persons with disabilities (PWD) sector gives good insight into which practices may help in creating a truly inclusive workplace and also some sense of what outcomes of those practices or lack thereof may result for stakeholders. For example, the adoption of inclusive recruiting strategies and policies along with HR support practices helps PWD feel included (Pérez-Conesa et al., 2020). One study found that a team-learning climate is a precursor to inclusion and moderates job self-efficacy and thriving at work for PWD (Zhu et al., 2019). Without inclusion, levels of both are higher for PWD. A study of 190 PWD found that inclusion led to higher levels of job satisfaction and organizational commitment and reduced intentions to quit (Heera & Maini, 2019).

Positive outcomes for individuals abound to be sure. Why should organizations be concerned enough with those to adopt an entire strategy that promotes IDEA?

Theoretical Foundations

Stakeholder Theory suggests that firms should provide value to more than just investors (Freeman, 1984, 2010; Freeman & Reed, 1983). Stakeholder theory is at the foundation of many studies examining the effectiveness of sustainability (Fernández-Guadaño & Sarria-Pedroza, 2018; Freudenreich et al., 2020; Goodman et al., 2017; Mathur, 2007; Perrini & Tencati, 2006; Schaltegger et al., 2019). Stakeholders have expectations of the behavior of organizations and meeting those expectations becomes critical to their financial stability and overall success. That argument is laid out in the sections above and one can see the natural progression in both CSR and sustainability that changes in the behavior of organizations are the direct result of societal pressure to make adjustments to the way that they operate and make decisions. Societal pressure on

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organizations to do better on sustainability markers results in better performance in these areas. Better performance meets stakeholder expectations while contributing to economic and social sustainability.

By taking a broad view of the stakeholder and the value that an organization provides to them, the hope is to develop a shared understanding of how an integrated diversity strategy contributes to social sustainability. When organizations adopt a balanced approach to managing stakeholders, no one group of stakeholders rises above others in terms of importance in serving their needs (Fu et al., 2019). We further recognize that stakeholders have varying needs. Audience members want to enjoy a performance that meets their specialized needs in terms of access. Organizational leadership wants to tell authentic stories on stage that lead to financial success by effectively engaging audiences. When organizations make consistent and balanced investments in multiple stakeholder groups then we should see equal social status amongst participants emerge. Stakeholder well-being will be positively influenced when stakeholder groups feel that their claims are receiving adequate attention (i.e., the integrated diversity strategy has accomplished what it set out to do, namely, increased social sustainability).

A secondary theoretical lens for this study is Resource Based View (RBV). RBV suggests that firms develop resources that are difficult to imitate and that result in competitive advantage (Barney, 1991; Wernerfelt, 1984). In the case of Creative Stages, the organization has developed competencies and relationships that are unique and difficult to replicate. If a firm wanted to imitate the type of competitive advantage

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Creative Stages has, it would take a long time to achieve because of the nature of the relationship-building competency that has occurred over the past 40 years.

Summary

The literature on social sustainability and corporate social responsibility provides a foundation in terms of what these activities look like when implemented and why they occur. Further examination helps to understand the impact that organizational culture has on what occurs as a result of initiatives intended to increase diversity in organizations. Finally, the literature provides insight into some of the outcomes we may find when IDEA is fully implemented. A balanced approach to stakeholder management and RBV provide complementary theoretical lenses for this study. The following chapter lays out the method employed to examine the why, how, and impact of the adoption of IDEA.

CHAPTER 3

Methods

Research Design

This qualitative case study consisted of 27 open structured interviews of past or present leadership and audience (customer) stakeholders engaged with Creative Stages. Creative Stages, a pseudonym, is an over-40-year-old performing arts organization located in a major city on the Eastern seaboard. Like most professional theatre companies across the United States, Creative Stages is organized as a not-for-profit corporation (NFP). In addition, the researcher examined internal documents (i.e., values statement, final IDEA statement, provided by the company) along with external media (i.e., website and social media pages) following the Yin (2017) protocol for case studies.

Explanation of Method

Qualitative case study methods are most appropriate for answering “how” or “why” questions (Yin, 2017). This study seeks to understand how and why an integrated IDEA strategy was adopted by this particular organization and also understand its impact on one stakeholder group (i.e., audience). Stakeholder groups were identified using the framework put forth by Mathur, et al. (Mathur, 2007). For that reason, this study was structured as explanatory. Furthermore, open-structured interviews are generally considered a rich field of data collection in case study research because of the “in-depth” nature of the description of the phenomena being examined (Yin, 2017).

The case study method is appropriate to use in cases that are critical, unusual, common, revelatory, or longitudinal (Yin, 2017). Outcomes, in this case, should allow us to draw inferences into what we can expect in the theatrical industry as a result of f

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adoption of this type of strategy and share best practices with other performing arts organizations. In a case study, the unit of analysis is defined as a “detailed study of a single social unit,” in this study it is Creative Stages, the organization (Myers, 2019). “The social unit is usually located in one physical place, the people making up the unit being differentiated from others who are not part of it. In short, the unit has clear boundaries which make it easy to identify” (Payne & Payne, 2004).

Construct validity was achieved in this study through the use of multiple sources of evidence (Yin, 2017). In this case study, both interviews with salient stakeholder groups and the examination of internal documents and external social media allowed us to achieve construct validity. Internal validity was achieved through pattern matching, explanation building, and addressing rival explanations (Yin, 2017). Explanation building was also a critical component of this study because we hoped to understand the how and why of the adoption of an integration IDEA strategy along with its impact on one salient stakeholder group. External validity was achieved through the use of theory in case study research (Yin, 2017). In this case, we explored both stakeholder theory and RBV as complementary theoretical bases. Reliability was achieved through a case study protocol (Yin, 2017). That protocol can be found in Appendix B.

Other qualitative case study structures were also considered for this research. Linear-analytic was considered and offered the most promise in terms of alternative structures (Yin, 2017). Given the nature of the theory-expanding work in this study, theory-building seemed a better fit overall. Additionally, a comparative approach was considered in which two organizations at differing levels of adoption of EDI strategy could be examined (Yin, 2017). The challenge in this approach at this time is that there is

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not enough known about the outcomes of an integrated diversity strategy on stakeholders in this context to be able to clearly identify a comparable organization at a similar stage in terms of the organizational adoption of an integrated diversity strategy. A quantitative approach was immediately dismissed because we simply do not know enough to be able to test stakeholder outcomes in a large-scale quantitative way yet. The hope is that this study is a first step to being able to test outcomes quantitatively in the future.

Sample

Our boundary condition in this case is clear. Participants engage(d) in programs with Creative Stages. If they have, they are part of the case. If they have not, they are not part of the case. We are looking specifically at the relationship between the organization and the stakeholder group (Parmar et al., 2010). The most salient stakeholder groups were chosen for this study, leadership or those who make decisions regarding the adoption of IDEA strategy and audiences (e.g., customers, parents of students) because customers drive earned income for the organization. Participants fell into one or more of the following groups: Members of the Board of Trustees, Executive Leadership, and Audiences (i.e., Parents of children who have participated in and have aged out of programs, Parents of children who have participated in programs for more than five years, and Parents of children who have recently started participating in programs). Participants were recruited in various stakeholder groups until saturation was achieved.

Participants were recruited through multiple methods. The Artistic Director introduced the study and encouraged participation from current executive leadership and members of the Board of Trustees. The Founder recommended participation to past executive leaders, members of the Board of Trustees, and parents of alumni of the

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programs. The current participants group was recruited through the organization's enrollment data. Parents of class participants, audiences who attended accessible performances, and audiences of the Theatre for the Very Young series were sent information about the study, offered free tickets to opening night, and encouraged to connect with the researcher through text or email. Opening night at this organization is an invited audience with complimentary tickets. In all cases, participants contacted the researcher directly without interference from organizational leadership. Confidentiality was protected for the participant group by holding tickets under the researcher's name at the box office.

Because the purpose of this study is to understand the impact of IDEA strategy on this salient stakeholder group, participants did not need to be a member of a group that would traditionally be considered as benefitting from a strategy such as this (i.e., BIPOC, AAPI, LGBTQ+, Gender Diverse, Women, Persons with Disabilities). Care was taken to ensure that members of groups that would be traditionally thought of as benefitting from the IDEA strategy were represented in the sample. Table 2 details participants' demographic information and stakeholder groups.

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Table 2*Demographic Information of Study Participants*

Pseudonym	Group	Age	Gender	Race	Disability	Child w/Disability	Length of Engagement
Lori	A1*	35	Female	White	No	No	<1 year
Jennifer	A2	32	Female	Mixed	No	No	3 years
LeAnne	A3	43	Female	White	No	Yes	4 years
Jamie	A4	34	Female	White	No	No	<1 year
Eve	A5	41	Female	White	No	No	<1 year
Yaling	A6	39	Female	Asian	No	No	3 years
Sienna	A7	47	Female	White	No	Yes	7 years
Sandy	A8	49	Female	White	No	No	7 years
Neha	A9	42	Female	Mixed	No	Yes	7 years
Yuhan	A10	48	Female	Asian	No	Yes	8 years
Linda	A11	77	Female	White	No	No	15 years
Kathy	A12/BOT1**	74	Female	White	No	Yes	37 years
Donna	A13/EL1***	73	Female	White	No	No	5 years
Rebecca	A14/EL2	42	Female	White	No	No	3 years/ 8 years****
Erika	BOT2	55	Female	Black	No	No	13 years
Timothy	BOT3	55	Male	White	No	No	7 years
Susan	A15/BOT4	54	Female	White	No	No	17 years
Thomas	BOT5	42	Male	White	No	No	4 years
Veronica	BOT6/EL3	71	Female	White	No	No	30 years
Debra	EL4	68	Female	White	Yes	No	38 years
Shelley	EL5	60	Female	White	No	No	30 years
Judith	EL6	60	Female	White	No	No	10 years/1 year
Joan	A16/EL7	52	Female	White	No	No	10 years
Elizabeth	EL8	78	Female	White	No	No	42 years
Laura	EL9	56	Female	White	No	No	20 years
Leo	EL10	59	Male	White	No	No	10 years
Mary	EL11	67	Female	White	Yes	No	10 years

Note:

*A= Audience

**BOT= Board of Trustees

***EL= Executive Leadership

**** Indicates a gap in participation. For example, this participant engaged with the organization for three years, took a break of unspecified length, and has been back for eight years.

Of six participants from the Board of Trustees group, one identified as BIPOC, and one identified as the parent of a child with a disability. The remaining participants were white without children with disabilities. The ages of this group ranged from 42 to 74. Two male-identifying and four female-identifying. The length of participation with

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Creative Stages ranged from four years to 37 years, with an average (mean) tenure of 18 years.

Of eleven participants from executive leadership, two identified as having a disability. One was male-identifying and ten were female-identifying. All 11 participants in this group identified as white. The ages of this group ranged from 42 to 78 with an average (mean) age of 62.4 years. The length of participation with Creative Stages ranged from five years to 42 years, with an average (mean) tenure of 19.7 years. Two participants in this group had gaps in their involvement with the organization. The first participated for three years as a student, left for a period of time, and has been employed with the organization in a leadership role for eight years. The second was employed with the organization for ten years, left for a period of time, and has been back in the same leadership role for one year.

Of fifteen participants from the audience group, four identified as AAPI or mixed race, and four identified as a parent of a child with a disability. Two of those four identified as both AAPI or mixed race and a parent of a child with a disability. The other 11 identified as white and not as a parent of a child with a disability. All 15 participants in this group identified as female. The ages of members of this group ranged from 32 to 77 with an average (mean) age of 48.6 years old. Six group members have participated for less than five years, and three of those were less than one year. Five group members have participated for more than five years. Of those one participated for five years, three participated for seven years, and one participated for eight years. Four participants fell into the students who had aged out of the program's range.

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Data Management

Once identified, participants were scheduled for a 30-120 minute open structured interview via Zoom at mutually agreeable times and verbal consent was obtained. The length of interviews varied significantly because some stakeholder groups (e.g., Executive Leadership) had significantly more knowledge of and engagement with the IDEA strategy than other groups.

Question protocols varied by stakeholder group, based on their role with Creative Stages, and can be found in Appendix B below. To obtain quantitative data from audiences to better understand the financial impact, five questions on a Likert scale were included in the protocol (i.e., How likely are you to recommend Creative Stages programs to other parents on a scale of 1-5? 1 is not very likely, 5 is very likely). Ultimately, the majority of this information was excluded from the analysis because the questions only applied to customers currently engaging in programs. That group is only about 75% of the audience sample when you take into account parents of alumni.

The question protocol went through a pilot study of three industry professionals and parents of students or audiences of arts education programs that are not included in the study itself to ensure that the questions being asked would elicit responses from participants that answer the research question. One question was removed from the protocol, and another was added after a couple of interviews were conducted. The question regarding the nature of the disability present was removed from the protocol because it became clear that the information did not provide significant additional value to the study. Identifying oneself as having a disability or being the parent of a child with disabilities was sufficient to address the intention of ensuring disability was present in the

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sample. The question “What do you expect to see from a company that diversifies on IDEA?” was added to the protocol for audiences because it became necessary to understand what their expectation was for all companies before they could compare that to what they saw at Creative Stages specifically.

All interview transcriptions were saved into NVivo 12, where they were coded thematically. NVivo is a data analysis software used in some qualitative studies that assist in the organization and examination of unstructured data like interviews. In the initial round of coding, general themes present in the research was the primary focus. Specifically, the data was being examined for themes aligning with outcomes associated with social sustainability, CSR, diversity climate, and inclusion. The outcomes of social sustainability being examined were equity, access, social justice, diversity, empowerment, social capital, social cohesion, and exclusion. The outcomes of CSR that were being examined were financial stability, team performance, and morale. The outcomes of diversity climate that were being examined were inclusion, return intention, and language describing the culture of the organization. The outcomes associated with inclusion that were examined were belonging, assimilation, marginalization, self-efficacy, thriving, and organizational commitment. Finally, the data was examined to determine whether the adoption was over time or immediate and whether the decision was intentional or accidental. Both social sustainability literature and CSR suggest that these adoptions are intentional and occur over time (Frederick, 1960; Sachs, 1999).

Through the first round of data analysis, it became clear that outcomes resulting from this strategy existed on multiple tiers, namely individual level, organizational level, and societal level. Participants were discussing the outcomes in more ways than one

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would expect the questions “In which ways were your child impacted by Creative Stages’ focus on inclusion, diversity, equity, and access?” or “How does the IDEA strategy at Creative Stages impact Audiences?” to elicit. Based on that realization, coding in this area was expanded to be able to identify on which level the outcome existed.

Individual-level outcomes were then broken down into three initial categories, cognitive outcomes, physical outcomes, and social-emotional outcomes. The thought, in this case, was that this is an organization that does arts education. One expects education to result in some measurable learning outcomes. Further, based on the physical nature of the art form, it seemed logical that there could be very specific outcomes in this area. Similarly, one may expect a behavioral outcome from this type of work. Ultimately, there was no evidence of either. Cognitive outcomes are present, but without a great deal of depth to identify subcategories in this area. The majority of the individual outcomes fell under the social-emotional realm.

Coding to understand how the strategy was implemented aligned with research that suggests leadership, organizational structure, and organizational culture are primary components of innovation (Sarros et al., 2008). Interviews were coded to those areas. Finally, the factors that led to the adoption fell into broad categories, internal factors, and external factors. Interviews were coded accordingly.

After approximately one-third of the interviews were coded thematically, the initial results were examined against the literature. Through that process, additional structure was added to the coding process and more definition was added to the criteria for how responses were coded. For example, initial coding of external challenges, and managing expectations included “The Board was very unsettled about that, first of all, all

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weren't too sure about including young people with disabilities into the regular classes, which their children were in." The thought was that the BOT should be considered an internal challenge because they are part of the organization even though they deal with issues of governance and direction and not day-to-day management issues which are what this initially felt like. This process provided additional clarity and definition for each step piece of the coding process.

Responses pointing to an understanding of "Why IDEA was adopted?" were coded in terms of external environmental drivers and internal drivers. Internal drivers included mentions of things that the organization had control over. External environmental factors included mentions of factors that were outside of the organization's direct ability to control. The second round of coding further refined the data as themes emerged to include external environmental drivers: 1. Unmet Stakeholder Needs 2. Rising Stakeholder Pressure 3. Nurturing Stakeholder Relationships 4. Challenging Stakeholder Norms. Responses coded to "unmet stakeholder needs" described the recognition of untapped markets and early attempts to meet those needs. Responses coded to "rising stakeholder pressure" described interactions with stakeholders who were looking for something specific in terms of IDEA that was not present at Creative Stages at the time. Further, responses that indicated a sense of the scale of urgency with which the pressure was addressed were coded in this way. Responses coded to "nurturing stakeholder relationships" described the ways in which stakeholders were introduced to the organization, built more formal relationships with it over time, and how those individual relationships became networks. Responses coded to "challenging stakeholder norms" described artistic risks that the organization took that

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ran counter to or stretched social norms of the time. “Technology advancements” and “shrinking external funding” were also initially considered as codes, but very little evidence of those were found in the data so they were excluded from the final results.

On the internal drivers, refined coding included: 1. Balance Divergent Perspectives 2. Balance Financial Realities with Social aspirations 3. Budgetary Constraints. Responses coded to “balance divergent perspectives” described disagreement within the organization about how to approach IDEA initiatives. Responses coded to “balance financial realities with social aspirations” described the relationship between what the organization wanted and how progress on those initiatives were slowed because the necessary financial resources to make them happen were not immediately available. Responses coded to “budgetary constraints” described the tight budget that this organization operates under. Table 3 below describes these.

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Table 3*Why was IDEA strategy adopted?*

Driver Type	Code	Range
External Drivers	Unmet Stakeholder Needs	
	Rising Stakeholder Pressure	<i>“General consumer commitment” to “specific program decision”</i>
	Nurturing Stakeholder Relationships	<i>“Awareness” to “Deep level relationship,” “Stakeholder recommendation,” “Leadership awareness”</i>
	Challenging Stakeholder Norms	<i>“Pull back” to “stand behind”</i>
Internal Drivers	Balance Divergent Perspectives	<i>“Long ago debate” to “Recent decision”</i>
	Balance Financial and Social Aspirations	
	Budgetary Constraints	

Note: This table defines codes and ranges used for participant responses that address the research question, “Why was IDEA strategy adopted?”

Responses pointing to an understanding of “How IDEA was implemented?” were initially coded to leadership, organizational structure, and organizational culture, the three necessary components of implementing change. Responses coded to “leadership” included references that personal advocacy and industry-level advocacy for specific policies and practices were present as well as responses pointing to the influence of responsibilities of leadership. Coding was refined as additional themes emerged. Leadership included themes of Financial Resource Management and Diversifying Partners. Responses coded to “financial resource management” describe decisions about how money was used or prioritized to further IDEA goals. Responses coded to

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“diversifying partners” describe leadership’s recognition of a lack of expertise within the organization and developing relationships with those who can bridge that gap.

Themes emerging from Organization Structure include 1. Quality Programs 2. Right People in Place. Responses coded to “quality programs” reference the high caliber of both performances and classroom experiences delivered by Creative Stages and comparative comments about other organizations. Responses coded to “right people in place” reference the human-driven nature of the programs.

Themes emerging from Organizational Culture include 1. Ethics-Driven Culture 2. Culture of Learning 3. Inclusive Culture. Responses coded to “ethics-driven culture” describe using the mission or a strong sense of right and wrong to steer organizational activity. Responses coded to “culture of learning” describe the process of taking in information and applying it to policies, procedures, and programs at all levels of organizational responsibility. Responses coded to “inclusive culture” describe the practice of including those who have been marginalized at all levels of the organization. Table 4 below describes these.

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Table 4*How was IDEA implemented?*

Type	Code	Range
Leadership	Leadership	“Organizational” to “Industry”
	Financial Resource Management	“Fully implemented” to “Emerging initiative”
	Diversifying Partners	
Organizational Structure	Quality Programs	“Low” to “High,” “Importance”
	Right People in Place	“Classroom support” to “BOT”
Organizational Culture	Ethics Driven Culture	
	Culture of Learning	
	Inclusive Culture	

Note: This table defines types, codes, and ranges used for participant responses that address the research question, “How was IDEA strategy implemented?”

Responses pointing to an understanding of the outcomes of this strategy were initially coded to Organizational Outcome, Individual (Stakeholder) Outcome, and Societal Outcome.

Themes emerging from Organizational Outcomes include 1. Financial sustainability 2. Improved Organizational Reputation 3. Achieving sustainability goals. Responses coded to “financial sustainability” referenced larger audience bases, new partnerships, or additional sources of funds that improved the financial health of the organization. Improved Organizational Reputation contains four parts: 1. Visibility 2.

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Authenticity 3. Diversity 4. Access. Responses coded to “visibility” described the diverse demographic makeup of both the organization and the audiences serve to be outwardly visible to both members of historically marginalized communities and those who are not members of that community. Responses coded to “authenticity” describe stories told and programs delivered that directly relate to a historically marginalized community by a member of that community. Responses coded to “diversity” describe intentional decisions on the part of leadership to increase involvement from members of historically marginalized groups. Responses coded to “access” describe decisions and actions intended to improve people’s ability to engage in programs or employment within the organization. Achieving Social sustainability goals has two parts: 1. Programmatic Pivot 2. Integration. Responses coded to “programmatic pivot” described the intentional change in the delivery of a specific program to better serve intended stakeholders. Responses coded to “integration” described a change in the way that an initiative was approached a from specific program to address a goal to being part of the way that the organization does business. Divestment was initially considered for under-achieving social sustainability goals, but very little evidence was found in the data. In all, two programs have been divested and one of those occurred prior to the adoption of the social sustainability strategy.

Themes emerging from Individual Outcomes include 1. Cognitive Outcomes 2. Social-emotional Outcomes 3. Friends. Behavioral and physical outcomes were considered as codes under individual outcomes but no evidence of changed behavior appeared in the data. Responses coded to “cognitive outcomes” referenced learning a skill or improved ability to think or reason. Responses coded to “social-emotional

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outcomes” referenced some new understanding of oneself or one’s relationship with others. Social-emotional outcomes has seven parts: 1. Acceptance 2. Belonging 3. Empowerment 4. Feeling Safe 5. Feeling Connected 6. Feeling Included/Inclusion 7. Feeling Valued. Responses coded to “acceptance” referenced openly entering a group or experience. Responses coded to “belonging” referenced a feeling about Creative Stages or the people at Creative Stages that indicated it was their place. Responses coded to “empowerment” referenced feelings of ability to do something. Responses coded to “feeling safe” referenced feeling supported and without self-doubt. Responses to “feeling connected” referenced attachment to people or the organization. Responses coded to “feeling included/inclusion” referenced being part of a whole. Responses coded to “feeling valued” referenced being able to contribute and having those contributions acknowledged. Responses coded to “friends” referenced whether they were present or not.

Themes emerging from Societal Outcomes include 1. Equity/Equal Social Status 2. Access 3. Social justice 4. Well-being. Responses coded to “equity” referenced societal level fairness. Responses coded to “access” referenced the ability to take advantage of opportunities beyond the work at Creative Stages. Responses coded to “social justice” referenced work done to address a large-scale social issue. Responses coded to “well-being” referenced both short- and long-term references to how participants are doing as well as the ability for stakeholders to recognize it and leadership’s intentionality in trying to achieve it. Table 5 below describes these.

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Table 5*Impact on Stakeholders*

Level	Type	Code	Range
Organizational	Financial Sustainability		<i>“Audience base” to “partnerships” to “foundation support”</i>
	Improved Organizational Reputation	Visibility	<i>“Low individual need” to “intentional decision”</i>
		Authenticity	<i>“Decision” to “Recognition”</i>
		Diversity	
		Access	<i>“Individual participation” to “Hiring practices”</i>
	Achieving Sustainability Goals	Program Pivot	
		Integration	<i>“Future looking” to “Achieved”</i>
	Individual	Cognitive Outcomes	
Social Emotional Outcomes		Acceptance	<i>“Individual” to “Environment”</i>
		Belonging	<i>“Individual” to “Shared experience”</i>
		Empowerment	<i>“Audience” to “BOT”</i>
		Feeling Safe	<i>“Individual experience” to “safe space”</i>
		Feeling Connected	<i>“Individual” to “Organizational”</i>
		Feeling Included/ Inclusion	<i>“Disability” to “Race”</i>
		Feeling Valued	<i>“Achieved” to “Forward-looking”</i>
Friends			<i>“Present” to “Not present”</i>

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Societal	Equity/Equal Status		
	Access		
	Social Justice		
	Well-Being		“Short term” to “Long term”

Note: This table defines levels, types, codes, and ranges used for participant responses that address the research question, “What is the impact on Stakeholders?”

Ethical Concerns

A request for approval of this study was made and granted by IRB. Interviews were audio recorded, transcribed, and saved to a secure drive. Transcriptions were primarily auto-generated through the zoom platform and checked for accuracy by the researcher. This process added a layer of quality control to the transcripts themselves. For two interviews, the auto transcription malfunctioned. Those interviews were transcribed through rev, an online transcription service. Again, transcriptions were checked for accuracy. Participants were given pseudonyms to insure confidentiality. Participants were over the age of 18 and were able to grant informed consent.

Summary

This qualitative study employed an array of open structured interview questions with 27 participants in addition to examination of documents, the organization’s website, and social media posts to understand why IDEA was adopted, how it was implemented, and the impact that it has on a salient stakeholder group, audiences. Interviews ranged from 30 minutes to two hours. Transcripts were coded thematically, and data were

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examined to identify the answers to the research questions. The next chapter discusses the results of the study.

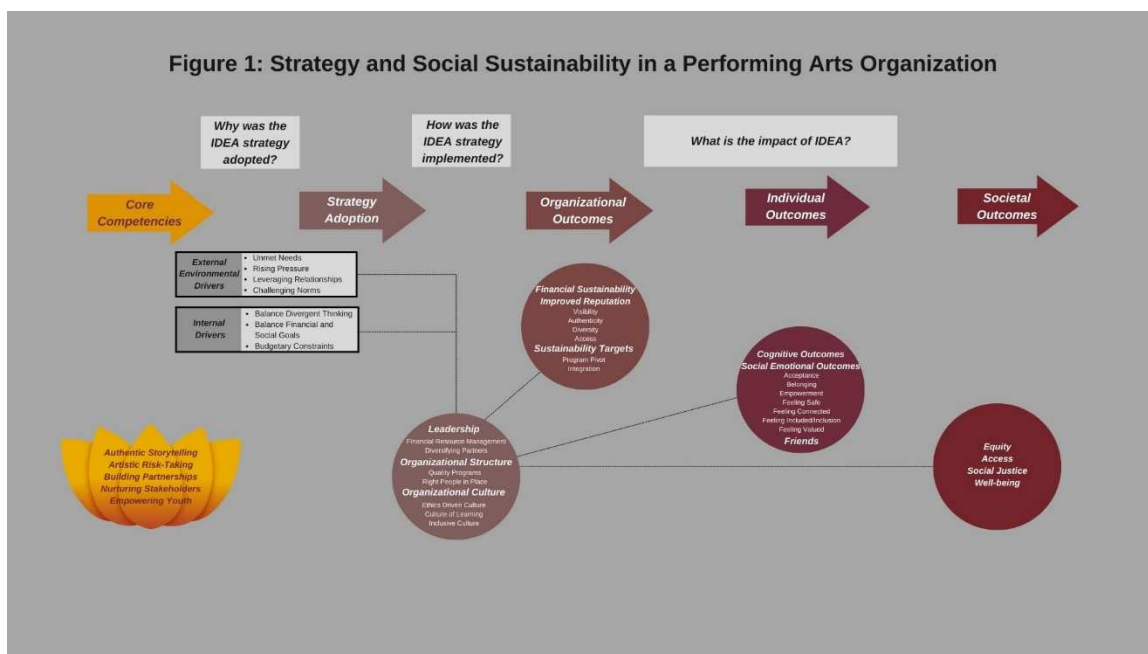
Chapter 4

Results

In terms of results, figure 1 defines the overall relationship between the factors involved in answering all three research questions. In it, we see that the organization developed core competencies that ultimately led to the successful implementation of IDEA strategy. Internal and external drivers acted upon the organization. The strategy was successfully implemented because of the organization's leadership, structure, and culture. Finally, three levels of outcomes are identified.

A key component of what was revealed in the data was the story of the adoption of IDEA as a strategy and the timeline of implementations. Because full implementation occurred in various ways over a period of 30 years and it continues to evolve today, it is necessary to include the timeline of adoption here to provide context for understanding the overall results of the study. Further, it is important to note that this information provides support for the adoption of social sustainability as an ongoing and intentional choice. Finally, the factors that led to the adoption, the way that it was implemented, and the outcomes were repeated regardless of the specific program that was being discussed.

Figure 1



Timeline

Creative Stages, a pseudonym, is an over-40-year-old performing arts organization located in a major city on the Eastern seaboard. Like most professional theatre companies across the United States, Creative Stages is organized as a not-for-profit corporation (NFP). This company exists to carry out its mission, which is to empower all young people to discover their voice and identity through performing arts

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education. There is an argument to be made that IDEA was part of Creative Stages' inaugural production in 1979. After all, the production of an elementary school talent show with a cast of 300 and a running time of three hours was how this company got its start. The founder, Elizabeth, wanted to recreate the kind of integrated arts experience that schools in her rural European childhood hometown boasted for her own children in the United States. No child who wanted to participate was excluded. The venue was changed from the elementary school to the middle school to accommodate both the size of the very large cast and the larger audience. With one production under their belt, the founder and her business partner began this company by offering performing arts classes. Today, this organization serves approximately 100,000 children, operates on a budget of \$4.9 million, and employs approximately 50 people full-time annually.

Cognitive & Physical Disability Access

The true IDEA strategy came about ten years into the business; Elizabeth had become aware that there were children with disabilities who were not being served. She was collaborating with a colleague from a local university, Veronica, who had been working on research in education. By chance, at an interview to hire a teaching artist, the founder turned to the interviewee's partner and said, "' So, Mary, what do you do?' And she said, 'Well, you know, I'm a drama teacher too. What I really want to do is bring the arts to young people with disabilities.' And you know Veronica and I looked at each other and said, 'Yes, of course!'"

From there, a decision had to be made to bring Mary on staff full-time. After research, it was discovered that no one else was serving students with disabilities with arts education programming... anywhere. There was no road map to be found on how to

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do this work. Further, this small organization functioned with a small and underpaid staff: two individuals making about \$7500 per year, a volunteer, and teaching artists who were contracted per class. Finances were tight. They knew that they would not be able to cover her salary with tuition dollars while she did the necessary research and wrote the curriculum. Elizabeth went to the “fledgling board” and said, “Look, we need to do this. We believe in it. We need money to pay Mary to go and figure out how to do that. She's got to find anything she can. There are no other models, but she's got to learn a bit more so she can devise the program. She wants to write a curriculum. That's going to take several weeks, maybe even months, before we can actually open the doors with any confidence that she is doing this right. We can't take risks with this population. It's just not ethical.” The board was hesitant about it, but the plan ultimately moved forward.

Mary took the time to learn. She described the process “I learned a lot by asking the kids, asking parents. We had a steering committee of people in the Community, like a principal of a school that had kids with special needs, [actor with a physical disability] who is very smart and really into the arts... She was a great resource. I just kept asking questions and figuring things out through trial and error.” This program grew quickly from “15 kids the first year to 200 in about two years. It just really grew, both in terms of kids who were able to integrate into a class, where I was able to give the teacher some help in how to make accommodations for that specific disability and in the classes that I was teaching.”

This program has transitioned into a fully inclusive model. Students with specific access needs are provided support in any class in which they choose to enroll. Mary has become a recognized scholar in this area and has published multiple books.

Access for Deaf Students

Two other important hires occurred in this period between 1987 and 1989. Leo was brought in as Director of Education programs and Laura was hired to teach and be the bookkeeper for the organization. Both were graduates of Veronica's program. In the summer of 1989, the group was gearing up for summer camp, and Laura explains, "We have this woman who comes in with her 12-year-old daughter. She says, 'You know, I've been trying to find a summer program. She's 12. She just wants to experience the arts. She loves dance. She likes theater. But, we've been turned down at two places because she happens to be deaf and I'm really frustrated.' and so, we had an access program, largely for children who had down syndrome and who had other developmental disabilities, some physical impairments. Mary said, 'Well, I'm pretty sure you don't have to look anymore, because we're going to figure this out,' as she goes, 'I think I have somebody in mind. Let's talk further.'" Laura was approached about serving as an aid for this girl during the summer camp experience. She spent a couple of weeks with the child's mother to learn cued speech and acted as a transliterator during the camp to make the material accessible to her. (Cued speech is a tool used by some to make spoken language accessible to them. It relies on eight hand shapes representing consonant sounds and placement near the face to make the distinctions in spoken language more clear. This is different from American Sign Language. American Sign Language is its own unique language.)

They decided to start a program. To do that, Laura had to build a relationship with the Deaf community, build enrollment, and get the board to agree to it. The board agreed

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but the stipulation was that this work was to be done in her spare time. The bookkeeping and dance program had to take priority. Laura describes that period of time, “I’m gradually learning the field. What do we need? How do we communicate? How do we market? Not a lot of people come when we market. Then, people are like well, we lost money. It was like, well, we haven’t really done it before.”

Growth in this program was slower because it took a lot of time and relationship-building to establish the connection to the community that it hoped to serve. It took time to gain the traction it needed; it was a success by all metrics. Laura summarizes it as, “20 years later, there we were with over a million dollars in grants. We traveled, published, and collaborated with the museum. It was a glorious, golden age of my life. It really was. I love what I do now, but there was nothing more magical than the chance of meeting that girl. And we always said, ‘we’re so glad the other people turned you down.’”

Professional Theatre

Also in the early 1990s, the professional theatre company was launched. Debra and Shelley had been working with the organization as teaching artists for quite some time at this point. Shelley was approached by Elizabeth who asked, “What’s your dream? What do you really want?” and I said, ‘I really want to direct adults doing children’s theatre.’ She said, ‘Oh, well, we can make that happen.’” They put together a small company that toured around to local schools for about a year and a half. The company then moved into a storefront in a local mall as was the trend in that period.

In terms of authenticity in their work, Debra says, “Right back to the very beginning, when Shelley and I were working in the 90s, we would be looking for scripts and there was nothing. There were a lot of Latino kids and a lot of black kids in the

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community, but there weren't scripts available. That's why we started commissioning [Latina playwright] and [black playwright] and a lot of the different people that we brought in over the years, writers, have been to fill a gaping hole in the literature for youth theatre.”

Similarly, there was intentionality in casting. In speaking of the early days of the professional theatre company, Shelley says, “We were just really mixing it up in terms of race. We made a very concerted effort, which means that we didn't necessarily always cast the best person for the role in terms of talent. We were much more focused on making sure that we had a diverse cast. A lot of that came from the fact that we wanted our audiences to be diverse. We wanted to make sure that everybody, all of the children in the audience, felt like that they could see themselves on stage and that was really important.” Authenticity and diversity onstage extend to the disability and Deaf communities as well. These experiences did not exist without failures and significant learning on the part of leadership. Debra recounts one exchange that led to furthering their commitment to authenticity and diversity onstage, “I commissioned [a playwright] who is a wonderful [midwestern] playwright, with pretty significant disabilities of his own, physical disabilities, to write this show and [actress] who has [a physical disability] and has been around [the area] for many years was cast as [ensemble]. She was going to be in the show, but she said to me, ‘It's not really as meaningful to have me in the background or playing a small role. If you really want to put your money where your mouth is, you should cast me as [lead].’ And I had that moment of ‘wow.’ I hadn't seen her as [the lead] until she said that... She was great in the role.”

Social Justice Theatre

Debra explains the start, “In 2014, I heard a news report on [National Public Radio] about how so many of the Latino youth were coming across the border and landing in [our] county because they had some family, not necessarily parents, but distant cousins or whatever, who were already there. It was creating big problems in the schools and the community because, there weren't sufficient resources to support the kids. They were traumatized by their journey, crazy journeys, from Central America and the schools had had to beef up their [English as a Second Language] teachers. The kids have very poor academic preparation, even in Spanish, compared with our own kids. Unfortunately, what evolved was the Latino kids who had been in the area, who were second generation, felt embarrassed by these newcomers and started bullying them. So, you had a really complicated social disaster, basically.”

A decision was made to help. Debra and Rebecca collaborated on building a series of workshops specifically designed to acclimate them, allow an avenue for self-expression through theatre activities, and process trauma. Further, the pair decided they would create a piece of theatre that would serve to advocate for these students to education administrators, politicians, and community members. This grassroots effort depended on dedicated ESL teachers and small grants of approximately \$25,000 per year because, the political climate at the time did not favor immigration initiatives. “Fast forward to now, we now have one [piece] about the kids from Central America and a second piece, that was developed because of that we got connected with the [local] police foundation to work with black teenagers, mostly boys, who are racially profiled and end

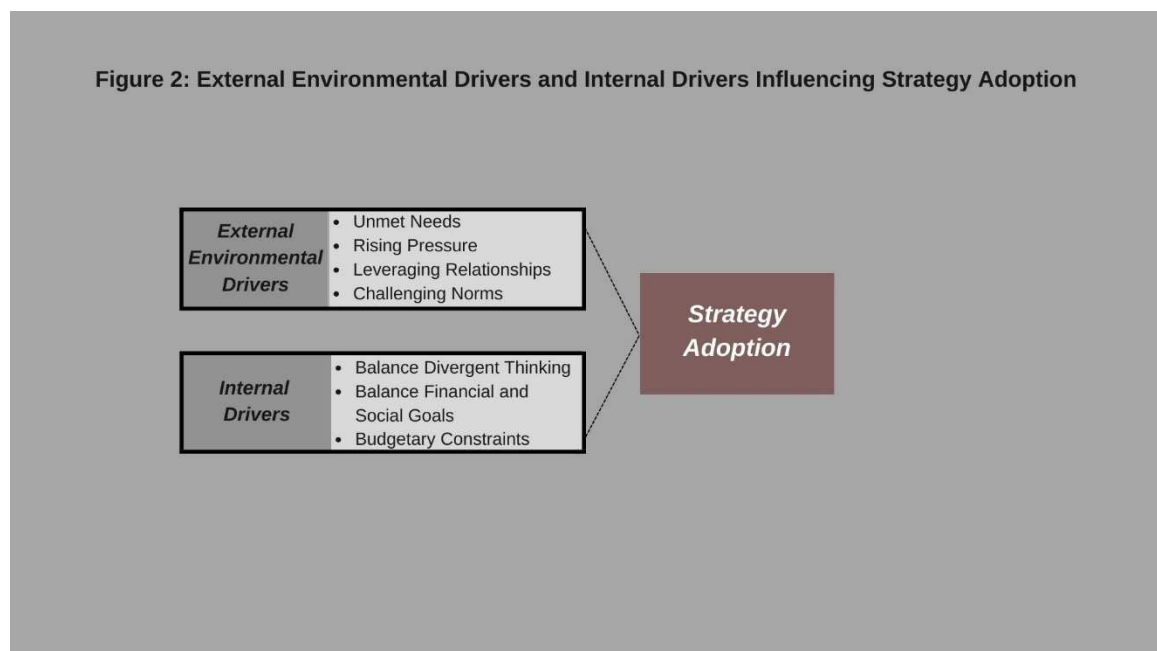
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up on a sort of school to prison pipeline. During the pandemic, we created a play about that issue which couldn't possibly have been more timely,” Debra explains.

The work is finally starting to pay off. The organization secured a partnership valued at \$285,000 to bring this work to all 25,000 10th and 11th graders in the local school district. “The dream, that's what I saw in 2014 should happen with this work and that’s where we are eight years. Eight years later, finally it's happening so that has been terrific.” Debra summarizes.

Why was the IDEA strategy adopted?

After revealing the overall story of the adoption of IDEA, in depth analysis of data to answer the first research question revealed that external and internal drivers contributed to the reasoning behind adopting IDEA, an example of social sustainability strategy. Figure two summarizes this information.



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External Environmental Drivers

In coding, 25 participants made 105 unique references to external challenges that led to the initial adoption and continued differentiation on IDEA strategy. Upon further refinement, responses were coded into:

Unmet Stakeholder Needs

11 participants made 31 references to the decision to adopt an IDEA strategy being tied to unmet stakeholder needs:

Linda: “Elizabeth just saw these kids who weren't being served.”

Leo: “Just saw an opening in took it.”

These initiatives started small to test the market and grew as evidence of favorable business outcomes presented:

Susan: “First, we have to start it and see if it's going to work and see if it's viable.

You start small to see if there an audience for this. Is this going to gain traction?

Are people interested in this?”

Rising Stakeholder Pressure

Society requiring organizations to do better is one of the ways that corporate social responsibility programs have developed over time. 10 participants and documents made 14 references to ways in which businesses were required to do better. Comments ranged from a general sense of consumer commitment to principles embodied by IDEA to a specific decision within a specific program as Erika’s and Debra’s comments indicate:

Erika: “I will seek those things out.”

Debra: “You should cast me as [lead].”

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This concept can also be examined through the lens of urgency. Responses through this lens ranged from urgent to relaxed:

Thomas: “things can accelerate”

Judith: “We will continue to improve”

Nurturing Stakeholder Relationships

16 participants made 39 references to building relationships with stakeholders in order to meet their unique needs. These references ranged from simple awareness activities:

Kathy: “She came home with a note in her backpack.”

They progressed to a much deeper level of relationship with customer groups:

Shelley: “We have really good communication with the parents to be sure that there's good support in place.”

The organization relies heavily on stakeholder recommendations to further its market:

Mary: “When people have a good time, they tell their friends.”

Jennifer: “I heard from one of his parent educators speak really glowingly about [Creative Stages].”

LeAnne: “I'm a clinician, so a patient actually referred me to come.”

Responses also indicate that there is a strong recognition within the leadership of Creative Stages that this relationship-building is important to effectively serve stakeholder groups.

Leo: “To start the Deaf program, she had to be accepted by the Deaf community.”

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Elizabeth: “That doesn't necessarily mean that they have money to give you. It might mean that they represent a community that you want to have more engaged.”

Challenging Stakeholder Norms

Challenging audiences to think outside their comfort zone is a risk that this organization takes on a regular basis. 14 participants made 28 references to the process of balancing artistic integrity with managing what audiences expect to see. On one hand, sometimes work is pulled back to make it more accessible to audiences:

Debra: “I knew what he had created was too authentic... to really work for our audience. He did a lot of rewrites for me, but I kept trying to get him to make the music more accessible to my audience.”

On the other, once they put the product out there, they stand behind their work:

Elizabeth: “People don't always want that. Just like they don't want the black Cinderella or they didn't. We're going back 20 years when we were doing those kinds of things, way ahead of the average theater. We were taking more risks.”

This process is a balancing act.

Internal Drivers

External factors only tell half of the story. There were and continue to be internal drivers that also contribute to understanding why this strategy was adopted. 16 participants and documents made 66 unique references to internal drivers that the organization faced that impacted the decision to adopt IDEA. Further analysis found the responses fell into the following categories:

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Balance Divergent Thinking

Inside many organizations, people have different ideas about how to approach an issue and the timeline on which they should be addressed. Theatres are no different. Six participants made 21 references to balancing different ways of thinking as an internal challenge. These responses ranged from long ago debates:

Elizabeth: “The Board was very unsettled about that. They weren’t sure about including young people with disabilities into the regular classes, which their children were in.”

They progressed to more recent discussions about which decisions should be made and how:

Timothy: “It's the tension and it's looking at that tension through a different lens that I think it's going to achieve what it is we want to do.”

Judith: “One of the things that's changed here is that now there's a much bigger groups of people who discuss the shows that are under consideration.”

Balance Financial Realities with Social Aspirations

Increasingly, organizations want to take actions that will result in positive social outcomes. Those actions must be balanced with revenues to achieve financial sustainability for the company. Eight participants made 22 references to decision-making surrounding balancing revenue and social outcomes.

Susan: “We're trying to raise money all around for a better wage for them as well as our staff in general, to keep people.”

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Elizabeth: “In a lot of artistic decisions, you're doing it for your artistic commitment your cultural and social commitment. If you are [Creative Stages], you're not necessarily good for economic reasons.”

Shelley: “There's a lot of other people who probably are more concerned about the business, about our patrons, about the bottom line, and all of that. I am concerned about that because, I want to keep the doors open, but it's more important to me to do the right thing.”

Budgetary Constraints

Seven participants made 18 references to tight budget constraints impacting the way this firm approaches its operations. For example:

Leo: “Elizabeth needed to generate income.”

Elizabeth: “This upcoming year has got a big budget deficit written into the budget right now. Fingers crossed that it can be erased as earned income starts coming back again.”

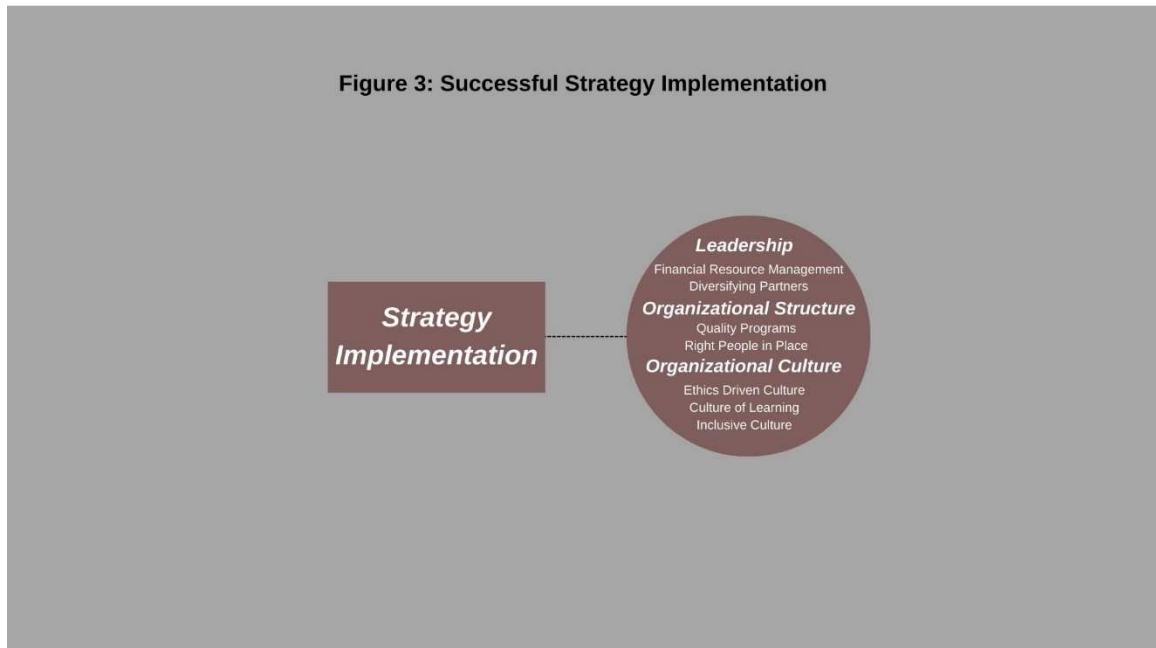
Debra: “I went to one of my money friends and, of which there are very few, and I said, ‘I need some money to start an IDEA fund for the organization, but right now, I need about \$2,000 to bring [candidate] up for interviews and see if we can persuade everybody that she's as good as I think she is.’”

How was the IDEA strategy implemented?

The factors discussed above, combined, drove the decision to adopt IDEA and to continue to develop programs that support it. The next question asks for an understanding of how the strategy was implemented after the decision was made. Examination of the data revealed that there were three primary components to effectively implementing this

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social sustainability strategy. They are Leadership, Organizational Structure, and Organizational Culture. Figure three summarizes these concepts.



Leadership

15 participants and documents revealed 72 references to leadership as being a critical factor in implementing the IDEA strategy. Leadership could be measured on a scale of organizational to industry because it referred to the importance of internal leadership at an organizational level. For example:

Mary: "It is the person at the top who sets what the attitude will be."

Debra: "She presented it with total belief in the need for it and that meant that everybody agreed without a blip."

Responses continued to address this organization's leadership within the industry in program development and IDEA overall:

Judith: "[Creative Stages] was leading earlier on diverse creative teams and now more people are doing it."

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Elizabeth: “An artistically brave choice but typical of what [Creative Stages] was doing”

Financial Resource Management

Appropriate financial resources necessary to adopt IDEA emerged as a theme primarily amongst participants from the executive leadership and BOT groups. Audience participants only mentioned this factor when they also had ties to one of the other two groups. 11 participants made 27 references to leadership effectively leveraging financial resources being an important factor in how IDEA was adopted. Financial resource management could be examined on a scale of fully implemented to emerging initiative:

Elizabeth: “The parent does not pay any more for the summer program. We pay to bring in a counselor to support that child's needs for the duration.”

Erika: “We will start to fundraise for a fund for IDEA. The goal being to have these funds demonstrate our deeper commitment.”

Diversifying Partners

Another theme that emerged as an important factor in the adoption of IDEA is the involvement of partners that provide skills and resources that are not otherwise present in the organization. Collaboration is an important aspect of not-for-profit operations because the financial restraints present do not allow for expertise in all areas that the business covers. Identifying and utilizing partners with a particular expertise or connection is a strategy employed by Creative Stages to achieve this objective. 12 participants from executive leadership and BOT made 25 references to partners being valuable to the organization in this work.

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Susan: “We bring people in who are connected to correctional facilities or who are connected to a refugee association that are involved in the community (that you are serving).”

Mary: “You create a team of people that are working together.”

Organizational Structure

Multiple references address structural factors that make the adoption of IDEA strategy possible. Further analysis revealed those references primarily fell into the following categories:

Quality Programs

Quality programs are at the heart of what makes this organization so effective in its IDEA work. 25 participants made 46 unique references to the quality of programs. The range of this construct is from low to high. Comments regarding low levels of quality were limited to references to the work of other companies:

Kathy: “I was surprised at the production value, very amateurish”

Quality of programming is cited as a primary reason that audiences choose the programs offered by Creative Stages over other options. That can be seen through sample responses like:

Yuhan: “The quality of what they offer is number one.”

Sienna: “It is really, really well done.”

Neha: “The performance was super high quality like we were blown away at the level of performance.”

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Further, both members of the executive leadership group and the Board of trustees group indicate that quality is important at Creative Stages. This can be seen through statements like:

Rebecca: “We are putting up the highest production quality that we possibly can.”

Debra: “Real issues, treating kids with respect and then wowing them with innovative ways of putting the story on stage”

Shelley: “Theatre for children should be of the highest caliber and... we do very sophisticated work”

Susan: “[Creative Stages] takes young artists seriously... they cause young audiences to think, to challenge their views. They engage them and respect them as an audience and students”

Right People in Place

19 participants and documents included 65 references to having the “right” people in place at the right time within the organization. References to “right” referred to every level of organizational responsibility from classroom support persons:

Sienna: “They're really good at kind of stepping back and just offering support when the student needs it.”

They referred to program leaders:

LeAnne: “She had me at... why don't you tell me what that means for Jonathon?”

They continued to include executive leadership:

Elizabeth: “We found the person who could actually do it and wanted to do it.”

Finally, responses pointed to members of BOT:

Laura: “Critical person developing staff and curriculum and programming”

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It is also clear from the data that Creative Stages makes significant investments of time and other resources to identify and recruit those who will be “right” for a particular role in order to move identified goals forward for the company. For example:

Mary: “Elizabeth had been looking for somebody to help make things accessible”

Debra: “We had that seed money for the fund, we spent it all to hire [program head] and she's now in charge of the [prison pipeline program] and all the programming around it.”

Organizational Culture

21 participants and documents made 136 references to aspects of the organization’s culture that led to the successful implementation of IDEA as a strategy.

Upon further analysis, the following categories were identified:

Ethics Driven Culture

Strong organizational alignment with the mission of the organization, which is essentially “arts for ALL young people,” and a clear sense of using that mission as a guide to make ethical choices, were present in the sample. 20 participants made 53 statements that indicate clarity in terms of how IDEA aligns with the organizational mission and the ethical component of how this strategy was adopted early on and how these decisions continue to be made. Examples of mission clarity statements are:

Kathy: “It was part of the mission that the arts are for everyone. It didn't matter who you are, your ethnicity, your developmental levels, your intelligence, your whatever, it didn't matter. [The] Arts are a growing experience for all children.”

Elizabeth: “The vision and mission has always been arts for everyone”

Erika: “If you're talking about the arts, everyone has to be represented.”

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Examples of statements that indicate a sense of ethics within the decision-making process include:

Timothy: “It’s the right thing to do.”

Mary: “People with disabilities deserve the arts as much as everybody.”

Shelley: “Do the right thing, and then, good things will come from that.”

Laura: “You should be here. I would have killed for this at 12. You live here, so you have rights to be here.”

Culture of Learning

Beyond the educational experiences that Creative Stage offers to youth, there is a culture of learning present within the company itself. This indicates a culture that embraces new information and incorporates it into everyday processes. 18 participants and documents reference their organizational culture of learning 60 times.

IDEA Statement: “We will always be open to thoughts and suggestions that help us better fulfill our IDEA goals.”

Elizabeth: “[There are] many different ways to communicate, all of which are effective. We got a lot back and that was unexpected. In serving the access and inclusion needs of young students with disabilities, we learned a whole pedagogy.”

Debra: “Creating the statement, attending a lot of trainings, and doing a lot of reading with staff over the last two years has made me realize it's not okay to plateau. It’s never really enough.”

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Inclusive Culture

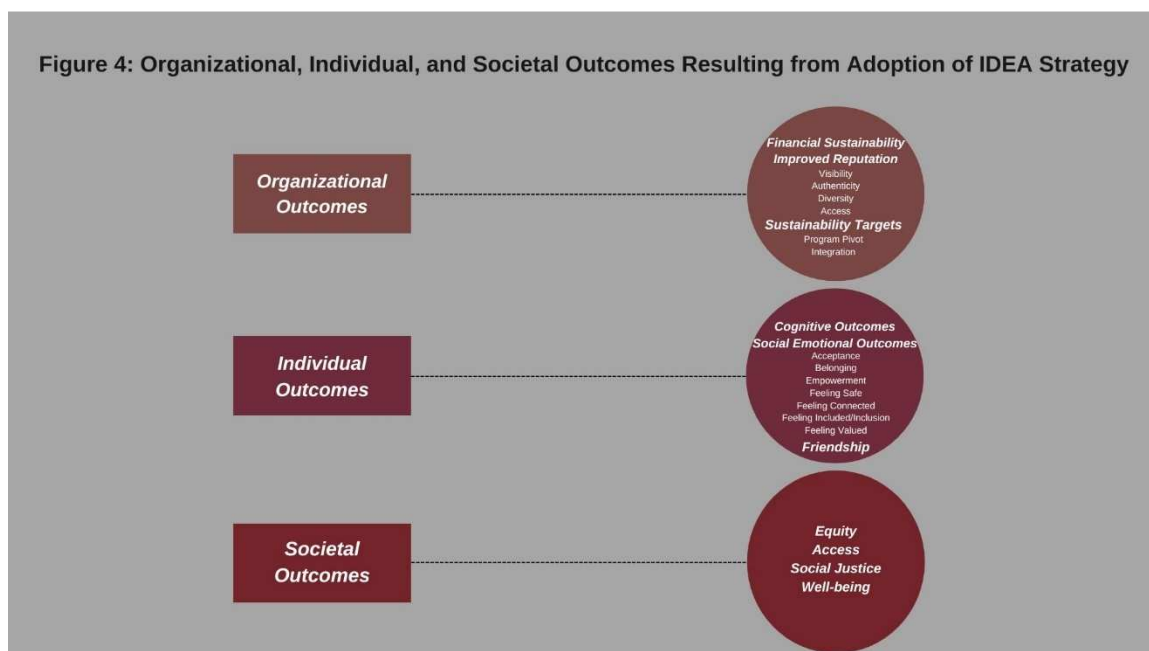
16 participants and documents made 43 references to an inclusive culture during interviews. Responses alluding to this cultural aspect spanned across all groups (i.e., BOT, Executive Leadership, and audiences) which indicates that it is present as part of the organizational culture. Example statements include:

Elizabeth: “We prioritized and focus on a slightly different philosophy which was much more inclusive.”

Yuhan: “Overall, [the] atmosphere is super inclusive and encouraging.”

What is the impact of this integrated IDEA strategy on a salient stakeholder group, i.e., audiences?

Now that there is an understanding of why and how the IDEA strategy was adopted, analysis of the third research question begins. Even though initially, the expectation was that only individual-level outcomes would emerge through this study an examination of the data revealed that outcomes exist on three levels, organizational, individual, and social sustainability. Figure four summarizes this information.



Organizational Outcomes

22 participants made 150 references to outcomes of IDEA that fall on an organizational level. These references were coded into the following categories:

Financial Sustainability

14 participants made 39 references to the financial sustainability of the organization coming from IDEA work. That sustainability comes from several sources. For example, an increased audience base was discussed by executive leadership:

Mary: “We went from 15 kids the first year to 200 in about two years. It just really grew.”

An increase in revenues from partnerships was discussed by members of BOT:

Timothy: “We have other partnerships that are coming, county public schools, has been a slow-moving train, but that really is starting to pay off.”

An increase in revenues from foundation and corporation support was discussed by executive leadership:

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Debra: “Now, all of this work is being recognized, not only as touching on important social, racial, and economic problems that teenagers are wrestling with, but also there's the will to fund it.”

Elizabeth: “Any foundation or corporation that's interested in [IDEA] would be more likely to support [it] better, because they see that that organization is doing the right thing.”

Improved Organizational Reputation

Improved organizational reputation on IDEA is one of the outcomes identified at the organizational level. Overall, improved reputation has four parts, visibility, authenticity, diversity, and access.

Visibility. 14 participants made 24 references to visibility as a reputational outcome at the organizational level. The responses ranged from audiences with no other personal interest in IDEA, being able to identify the visibility of diversity as a way that they know IDEA is present in this organization:

Jennifer: “They have a lot of different cast members that come from different backgrounds.”

Sandy: “I can say that we see kids of all backgrounds.”

The responses continued to intentional decision-making on the part of the leadership that visibility of diversity was going to be front and center:

Leo: “Visibility. Visibility. Visibility. They're just typical kids.”

Debra: “All these princess characters for so many years have been only white and that matters to kids so, I think we knew that.”

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Authenticity. 10 participants made 15 references to the authenticity of the work being produced. These references range from intentional organizational decisions to produce work authentically:

Rebecca: “We are pretty focused on really being authentic to who we are and authentic to what the voices of our community want.”

Debra: “That [show] got done everywhere in the country, because it had that ring of safe familiarity to parents, but [Latina playwright] took it the extra mile and made it all about [the] culture.”

The range continued to audience recognition of the work being done and the opportunity to engage in thoughtful conversation that work provides:

LeAnne: “And even when you look on stage, I do not see a bunch of white representation... I see a story about two Indian Princesses... I think [it] is wonderful and really opens the door to a lot of different types of conversations and a lot of different ways of looking at things.”

Diversity. Seven participants made 11 references to diversity being a central component of improved organizational reputation. For example:

Debra: “Just making the statement that we need to aim for 50% of our staff being BIPOC has led to some hires that might not otherwise have been made in the past, both for staff positions and for contract labor.”

Judith: “There's really virtually always been a real sense of representing diversity on the stage with the performers and within in the production [both] designers and company.”

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Access. 12 participants made 21 references to reducing barriers through improved access to participation as being a key component of improved organizational reputation. These references included various methods of reducing barriers from financial support for individuals to participate:

Kathy: “We had scholarships and we'd raise money for these scholarships.”

The references continue on to address adjusting organizational practices to remove all barriers to participation:

Susan: “We dropped the education requirement that apprentices have.”

Elizabeth: “We now advertise the range for a particular job... We are more transparent.”

They continue to provide the support necessary to allow broader participation in programs:

Shelley: “It used to be that we had particular classes for neuro [a]typical teenagers and kids. Now, it is all-inclusive. People, who have a particular need, can take any classes that they want. We support them through whatever they need.”

The intended result of this work is clear, as Rebecca states, “it means that families, regardless of what their background is, what their financial status is, what their abilities are, and what their family structure unit is are comfortable coming to [Creative Stages].”

Achieving Sustainability Targets

Upon examination of the data, two specific outcomes result from examining the way that the program is performing with the sustainability targets that the firm has set. When the program is not doing what it needs to do, the company makes changes until it

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does. Once it is consistently performing in the way that it needs to perform, it becomes entirely integrated into the company and is no longer considered a separate “program.”

Program Pivot. Six participants made nine references to changes made in the delivery of programs to better align with sustainability goals:

Rebecca: “Our focus has [moved to] the work we're doing outside of our building.”

Joan: “Instead of everyone coming to [us], we are going to them to give them more of the experience. We're not limited to just our space anymore.”

Integration. Nine participants made 14 references to moving initiatives from a distinct program that the organization delivers into a fully integrated part of the organization’s practice and culture. These references range from future looking in acknowledgment of work to be done:

Rebecca: “Our next step is actually breathing our IDEA practices [into] organization meaning.”

They continued to emphasize a completed step:

Susan: “We always felt we were like that.”

Timothy: “Inclusion, diversity, equity, and accessibility are part of the DNA of the organization.”

Shelly: “We're living what we say we are and this is important. It meant a lot of a lot of people.”

Stakeholder Outcomes

28 participants and documents made 228 references to specific outcomes at the individual level. Those references were grouped into “Cognitive Outcomes” and “Social

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Emotional Outcomes. Social-emotional outcomes were further coded into the subcategories explained below.

Cognitive Outcomes

Seven participants made 10 references to cognitive outcomes resulting from the IDEA strategy. They ranged from learning a specific skill:

Rebecca: "I loved learning sign language."

Responses continued to evidence of the work leading to an improvement in cognitive processes like:

LeAnne: "He gets a lot out of storytelling. It's part of how he processes the world. Relating different things to stories."

Elizabeth: "They didn't necessarily have the language, but they would say things like there's so much more stuff in my head now."

Social Emotional Outcomes

Multiple social-emotional outcomes were identified through the examination of the data. When taken together and applied to a societal level, the parts make up "well-being," discussed below.

Acceptance. 12 participants and documents made 21 references to acceptance resulting from IDEA. These references ranged from individual experience:

LeAnne: "He's a person who gets to be in the room. [At Creative Stages], you have that. Done and done."

They continued to a broader description of the overall environment:

Jennifer: "Just take everyone, as they are."

Erika: "Opening eyes and acceptance and embracing all people"

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Leo: “It was a very open and accepting environment.”

Belonging. Eight participants in 13 references pointed to belonging as an outcome of IDEA. These ranged from individual perception:

LeAnne: “It makes me feel like this is now one of his places. He runs through the door and it's his place.”

Erika: “I feel like I belong. There's a sense of belonging.”

Linda: “But for these kids, it was more of a passion, if that makes sense. This was something very special. They felt very special.”

The responses to a collaborative approach to be part of a larger shared experience:

Kathy: “They had experiences they never would have had. They got to meet other people who are happy [and] have had similar experiences in a very comforting and fun environment. They got to talk about the issues that were important to them through the play.”

Linda: “Any parent who came making inquiries, it was always abundantly clear. We would love to have you part of our community.”

Mary: “From the very beginning, we're all in this together. We're working together. We each have something to contribute.”

Empowerment. 11 participants made 22 references to empowering young people as an outcome on the individual level. Evidence of empowerment came from all participant groups. For example, audience groups said:

LeAnne: “It's a lovely thing for him to be able to feel like, oh yeah, I can totally try that thing.”

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Sienna: “They really curate that experience for your child so that they're successful.”

Members of the Board of Trustees said:

Erika: “We can empower minds and keep minds that are open already, open further.”

Executive Leadership said:

Debra: “The first 12 years of your life are indicative of how you're going to cope with the rest of it. Anything that we can do to provide hope or empowerment to someone who still in their formative years is a good drop in the bucket towards helping them forward.”

Elizabeth: “We're talking about empowering young people by giving them a voice.”

Feeling Safe. Six participants made seven references to feeling safe.

These responses ranged from individual experiences of feeling safe:

Neha: “I know that she can be comfortable like, ‘Oh, this makes me feel anxious and just express it openly to a counselor. She doesn't feel like she has to hold back at all. She can be open with how she's feeling which is helpful.”

Timothy: “My more direct involvement came through my daughter who struggles with depression and anxiety and was having a hard time finding her way in elementary school, in particular. [Creative Stages] was a safe and productive landing place for her.”

They continued to the intentional creation of a space that is safe:

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Thomas: “I get to help create this place or foster this place that's a safe place for all of these people.”

Feeling Connected. Seven participants made 10 references to feeling connected. These range from connection to individuals:

Linda: “I think a lot of kids who just, they're really like round pegs and they don't fit in any of the holes in school. They may be more artsy or maybe edgy, or maybe something more dramatic. And this is their place. This is their group. And this becomes their identity for the time that they need it, and they're nurtured.”

LeAnne: “They really become a team collaborator with you.”

The responses continued to indicate a connection to the organization:

Donna: “I always felt part of it, I miss it. It was my favorite job of all my jobs.”

Feeling Included/Inclusion. 12 participants and documents made 22 references to the meaningful inclusion that occurs at Creative Stages. Most of the responses were positive on the scale and the respondents were speaking about inclusion from a disability perspective:

Sienna: “[In all] of the programs, [Creative Stages] allows students of all abilities to participate and to be meaningfully included.”

Neha: “I asked about classes for my autistic kid. They've always said ‘just sign them up, for whatever you want, and then let us know. We'll support him.’ So, I've always felt like he could do whatever he wanted.”

Negative responses dealt with race:

Erika: “I do still believe that, with all of this positive work and commitment and outcomes, there is still a perception that [Creative Stages] is for white people.”

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Feeling Valued. 12 participants made 15 references to feeling valued.

These responses were on a scale of achieved:

Mary: “It's much easier to focus together and to work together, when you have a purpose. People give to that purpose. Other people see the gift that has been given, whatever that piece of creativity is, and they recognize it.”

They continued to forward-looking:

Susan: “They will feel understood, heard, valued, and appreciated.”

Thomas: “It should just make them feel, especially in a polarized world, that they're in a place where they're going to be appreciated and scored on their work and their performance, and not on anything else. They have a place that they can come and thrive.”

Friends

14 participants made 21 references to friends. There is an interesting dichotomy in this part of the data. There is a clear split between the views of parents of children with disabilities who are currently enrolled in classes. Of the four parents of children currently enrolled, three of them stated that their child did not make friends through these programs.

Yuhan: “No friendship beyond class.”

LeAnne: “We definitely are friendly. It's kind of a harder hurdle for him to get over to actually make a friend.”

Sienna: “Even though she has not made a friend in those classes, I can see that she is trying to engage with other people.”

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The fourth parent in this category did not answer the question when asked. Parents of students who have aged out of programming and other parents of students say that their children made friends:

Kathy: “It was a very deep friendship.”

Donna: “Her best friend, to this day is someone she met at [Creative Stages].”

Sandy: “She did a summer camp there and made lots of friends.”

This is regardless of disability status. Kathy identifies as a parent of a child with a disability.

Second, the survey protocol did not include a question about friends in the executive leadership group or the Board of Trustees group, yet participants in these groups often brought up friends both inside the classroom and out when discussing programs:

Mary: “They would then treat them as their friends in school. They made sure that nobody teased that person, go up and say, ‘hi’ during the day, and talk about them as their friend, which I did not ask them to do, but they did it because it came from their heart.”

Laura: “She comes. It's working. She's meeting friends. Everything's going great.”

There are a couple of possible explanations for this, all of which require further study. It could be because perceptions of events can change over time. Except for Sandy, many years have passed since the events being described in the interviews. There could also be a difference between the perceptions of those “inside” the room in classes and a parent’s perception of what is happening in them without physically being there. The final possible explanation could be that making friends takes time, these students struggle

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with that, they are working on it and, by the time they age out, they will view these relationships as friendships.

Societal Outcomes

On a societal level, four primary outcomes were identified after examination of data. They are Equity/Equal Social Status, Access, Social Justice, and Well-being.

Equity/Equal Social Status

Three participants and documents made eight references to equal social status as an outcome of this sustainability strategy. References tend to point out the importance of starting this work when children are young:

Erika: “We're behind as adults. My kids will see programming and be like, ‘Okay, where's all the inclusion? I don't see anything here. And why are only the girls kissing the boys?’ I'm telling you, my kids are involved.”

Shelley: “The value of representing all people in our [work] and in starting at a very young age, that is really planting seeds for the future.”

Access

People having access to opportunities is a societal-level outcome. Six participants and documents made six references to opening doors for underserved communities to access the Arts.

Mary: “At that time, people were beginning to realize that [people with disabilities] deserve the right to be in the audience, but it still wasn't a right to be able to participate. That kind of made me angry because I'm really into fairness.”

Thomas: “We want to make sure that children from underserved neighborhoods get to come see a show.”

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Susan: “It was about making sure that we had scholarships for students that couldn't afford our programs.”

Social Justice

Social justice is another societal-level outcome. Five participants and documents made seven references to addressing issues of social justice through their work. For example:

Susan: “A whole world of people that were not necessarily just theater but, the Hispanic community or the community that is welcoming refugees into this county. They're interested in what we're doing in the schools to help integrate those kids into the schools and to build tolerance so connections in those communities are super important.”

IDEA Statement: “We use theatre arts to explore complex social justice issues and amplify historically marginalized voices through our... programming.”

Debra: “A second piece that was developed, because of that, we got connected with the [area] police foundation to work with black teenagers, mostly boys, who are racially profiled and end up on a sort of school-to-prison pipeline.”

Well-Being

Finally, well-being was identified as a societal-level outcome of Creative Stages' social sustainability strategy. In addition to the components identified at the individual level above, 18 participants made 60 additional references to overall well-being. These range from short-term impacts for current students:

Yuhan: “He's also doing really great at school now at school he's getting straight A's.”

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Sienna: “We went to the final sharing and she was really shining.”

Responses continued to long-term outcomes that participants in [Creative Stages] programming achieve as adults:

Kathy: “She's an opera singer now.”

Mary: “We had another person who is now a pediatrician.”

Laura: “You're an amazing dad.”

They also range from recognition of the strategy from a stakeholder perspective:

Erika: “We would literally look at the [Creative Stages] offerings at the beginning of each season to see where the diversity was and because it was always present, we went to all of the shows. We didn't just go to the ones that we thought [would have] people who look like us. We all went to the other ones as well, because we felt that the theater represented all people, all experiences in life, and so that made it more inviting for us in terms of content and performers.”

They continue to leadership stating the intentionality behind the strategy:

Shelley: “We're bending small minds. I want the children that we show our work to, to think of the world as a big, beautiful place filled with a lot of different kinds of people and create a tolerant society. You have to start with kids.”

Summary

This chapter identified the timeline of that the adoption of IDEA occurred as well as factors uncovered in the exploration of how and why the strategy was adopted. Further, three levels of outcomes, individual, organizational, and societal were revealed. The next chapter discusses the implications of these findings.

Chapter 5

Discussion

Discussion of Findings

This research set out to uncover why IDEA is adopted, how it is implemented, and what impact this social sustainability strategy has on stakeholders. The goal was to better understand how one performing arts organization, Creative Stages, crafted and implemented a social sustainability strategy. This study defines social sustainability strategy as a strategy that fully integrates social sustainability into the organizational culture to support stakeholder well-being and health. We chose that definition based on a wide-ranging and still developing body of social sustainability literature that attempts to define the outcomes of such a strategy.

This qualitative case study examined Creative Stages, a performing arts organization that has successfully differentiated itself from other organizations by developing a social sustainability strategy focused on IDEA (inclusion, diversity, equity, and access). Furthermore, this study showcases an organization that has been a pioneer in designing and implementing this strategy for much of its entire 40-plus-year history. Their approach to meeting stakeholder needs is rooted in research, practice, and decades of careful planning. Study participants described the organization's focus on stakeholder well-being and health as rooted in the organization's DNA and a core part of its philosophy such that it is now part of the organizational culture.

This study sought to fill the gap in the literature by evaluating social sustainability strategies in the less-studied performing arts context. Outcomes resulting from the strategy have been identified in this study and are testable in other organizations and

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industries. Additionally, the stakeholder outcomes span the test of time and the results seem to be consistently repeated regardless of the length of engagement with the organization.

Despite seemingly vast differences in industry type, this initial foray of evaluating social sustainability strategy in the performing arts industry finds that many of the stakeholder and organizational outcomes identified within the literature were found present in this context as well. Remember that social sustainability literature found its roots in urban planning and development (Campbell, 1996) and transitioned into supply chain and manufacturing (Gregori et al., 2017; Sutherland et al., 2016). Empowerment, Equity/equal social status, access, and well-being were all present in the data.

Empowerment was a heavily referenced theme in the Creative Stages interview data. That outcome aligns with the work of Bramley, et al (Bramley et al.) and can be defined as the ability of people to participate on their own terms in ways that influence choices and decision-making. The results show that Creative Stages acknowledges that children are the most powerless group of individuals in our society. Their work to empower children with knowledge about the world around them, gives children practice using their voice, builds their capacity to form relationships and develops their critical thinking skills.

Equity/equal social status appeared as a significant social sustainability level outcome. This aligns with the work of Sachs (Sachs), Godschalk (Godschalk), and Cuthill (Cuthill). Equity is broadly defined as resources distributed fairly, meaning that resource distribution is done in ways that meet the needs of individuals versus everyone receiving exactly the same resources. This can be seen at Creative Stages through

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initiatives that remove hiring barriers like eliminating education requirements from some positions and being transparent with salary ranges for all positions. It can also be seen through intentionally casting actors that reflect this majority-minority county's population. Finally, one can see it in the freedom of choice given to students with accessibility needs in terms of which activities they want to participate in.

Access was another significant societal-level outcome. This aligns with the work of Sachs (Sachs), Hans-Böckler-Stiftung (Hans-Böckler-Stiftung), and Thin et al., (Thin et al.). Access allows people who benefit from additional support and adaptation to take advantage of opportunities. Access is built into every facet of Creative Stages from physical and structural choices in the building itself (i.e., there is a wheelchair ramp backstage in the theatre to allow users of wheelchairs to get onstage) to acknowledging that work outside of the building allows those communities without the means to travel to the theatre to benefit from its programming. One of the early key strategic decisions that the Board of Trustees made was bringing Mary on to develop arts education programs that serve students with cognitive disabilities. They did this without a clear path to generate revenue to cover the cost of her salary. That decision paved the way for the implementation of this strategy.

Finally, we find alignment with the prediction that social sustainability strategies result in the social integration of culturally and socially diverse groups (Polèse et al., 2000). Even audience members without specific access or representation needs, who could not identify that the IDEA strategy was present in any other way, could identify that they see people of all backgrounds in the Creative Stages building. This represents the full social integration predicted.

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While outcomes pointing to social sustainability have been discussed in the existing literature, three different levels of outcomes were identified through this study. These are organizational-level outcomes, individual-level outcomes, and societal-level outcomes. Because participants in all categories, members of BOT, executive leadership, and audiences discussed their own experiences and the experiences of individual children, there was a higher level of emphasis placed on individual-level outcomes in the interview data. The individual-level outcomes are particularly important because collectively, they represent the components of well-being. These constructs can be used to measure progress toward social sustainability outcomes. The individual-level outcomes in the shorter term may allow us to evaluate the overall long-term impact that organizations have on social sustainability. They also allow organizations to develop programs with specific individual-level outcomes in mind with the intention of larger-scale societal impact. This approach could aid in the development of a holistic way to measure sustainability performance (Lobos & Partidario, 2014).

Further, organizational-level outcomes emerged from the data. These outcomes included the financial sustainability of the organization and improved reputation. These point to some of the key drivers of organizational performance and provide us with a better understanding of the positive influence of social sustainability strategies.

As Sachs (Sachs) discussed, sustainability is a process. We see that in action in the work of Creative Stages through the adjustments made in how accessibility needs are addressed in the classroom. Initially, students with accessibility needs were served in a separate classroom. Today, all classes are options for all students regardless of accessibility needs. Further, sustainability is not an accidental outcome (Frederick, 1960).

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It is an active choice. This organization consistently listens, learns, evolves, and pushes the envelope. We see that through the initial identification of unserved markets in the work that they have done with people with disabilities, the Deaf community, immigrant populations, and those in the school-to-prison pipeline. It continues in the development of high-quality programs that are delivered in ways that reach intended audiences equitably. One can see that through the work being done in schools to address the immigrant's experience. The program is delivered in schools and in Spanish. Approaches are adjusted as communities and needs change. We see that through the change in delivery method for children with accommodation needs from distinct sections of classes that serve students with disabilities specifically to a fully inclusive curriculum that allows open access to anyone regardless of specialized needs without additional cost to parents. Finally, we see the organization pushing the needle forward whether it be through developing creative work that allows for authentic storytelling well before it was in vogue or addressing a social concern with arts programming like the impact that young immigrants are having on the local school system.

Stakeholder theory and RBV provided complementary theoretical foundations for this work. Stakeholder theory predicts that stakeholders have behavioral expectations of organizations and meeting those is critical to the overall organizational success (Freeman, 1984). When firms take a balanced approach to investing in stakeholder groups, no single group rises above another and equal social status emerges (Fu et al., 2019). We see that in Creative Stages through the work being done in all parts of the organization. Creative Stages has consistently invested resources in serving audiences from all backgrounds and needs in support of its mission to provide arts and arts education to all. That work has

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resulted in a sustainable financial model for the organization and impacted the community both in terms of individual outcomes and social sustainability outcomes.

RBV suggests that firms develop resources that are difficult to imitate and that results in competitive advantage (Barney, 1991; Wernerfelt, 1984). We see this play out in Creative Stages as well. Over the past 40 years, Creative Stages has built core competencies in several key areas that has led to long-term success in its work in the social sustainability realm. Those core competencies are indeed difficult to imitate and are what makes the adoption of social sustainability strategy possible and effective. They are:

Authentic Storytelling

The authentic stories being told by this organization extend beyond the stage. They align with the mission of the organization and ask stakeholders to envision a picture of the future for their children. The future is a vibrant, bustling society that lifts up those who need it and values all of us equally. Social sustainability is the norm. Children play a critical role in that future world, and Creative Stages inclusive storytelling provides their key stakeholders with the necessary experiences that allow for that vision to come true. These stories are told to everyone, partners, funders, politicians, parents, and the children themselves. Through their authentic storytelling, they celebrate diversity and are able to influence a wide variety of stakeholder groups so that each and every one of them sees that their contribution matters. Partners understand that they provide the expertise that is not present within the company itself and can use that to open doors for others. Funders understand that their contribution impacts in meaningful ways. Their dollars make these programs that serve students possible. Politicians remove legislative barriers and enact

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policy that enables forward momentum. Parents want their children to grow up and contribute to a just society so they provide experiences that will make that true. Children learn about their world, the people who make it up, and the events that shape our lives. They understand that they are not alone, their experiences matter, and they are empowered to make the world better.

One participant quoted the founder as having once said, “I could sell the peel off of an orange.” The story behind that orange peel sure must be great. The color, the scent, the texture, its protective nature, and the benefits, all contribute to its greatness. Creative Stages has a distinct ability to lay out all of the ways that it benefits to entice people to want to be part of it. The ability to tell stories as authentically and effectively as Creative Stages does represents a core competency of the organization. This broad and well-developed strength bolsters the work being done onstage and is critically important to the success of this organization.

Artistic Risk-Taking

Stakeholders, writ large, have come to expect a level of artistic risk-taking from this organization. One, simply, does not come to this theatre expecting a traditional telling of *Cinderella* or *Harold and the Purple Crayon*. There will be some new lens through which this story is told. There will be some “greater good” impact infused into a seemingly innocuous piece of children’s literature that parents feel like they know. Children will see unexpected and fully intentional casting choices. Children will experience content educating them on social and cultural competencies. Theatre will be used to address pertinent social issues. Audiences will be challenged to think differently about the world around them.

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Audiences have come to expect this approach. They would not continue to engage in it if they did not see it as valuable. This risk-taking extends beyond their mainstage season. We see it in the way in which they approach inclusivity in the classroom. We see it in the new ways that they address immigration through immersive classroom experiences. We see it in the way that they build their production teams.

This artistic risk-taking behavior has become a core competency of the organization. They have built a reputation on it. It takes performing arts organizations decades to build the kind of brand trust that Creative Stages has with its stakeholders.

Building Partnerships

Partnerships have been incredibly important to this organization from its early days. Creative Stages recognizes where their expertise, abilities, and resources end and identifies partners who aid in moving the work forward. Potential partnerships are identified. Relationships are built and nurtured over time. Successes are shared.

One can see this in outwardly visible ways. Partnerships are formed with government agencies. This organization was able to build its theatre building into the side of a government-owned parking garage. Partnerships are formed with others serving stakeholder groups in complementary ways. One can see this through their partnering with organizations that serve students with disabilities with arts programs after they age out of Creative Stages. One can see it through partnerships with English as a second language teachers and social workers serving immigrant populations in the schools. One can see it through partnerships with the police that build programs to address the school-to-prison pipeline. Partnerships are formed with the community. This organization's widest network of supporters who recommend their work to new customers are

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community members who know of the quality that they put forward and recommend their work to others. Partnerships are formed with parents. Parents feel like Creative Stages staff and teachers are part of the “team” that they have worked hard to cultivate to support their children.

Building these partnerships has become a core competency of this organization. They see the importance of them, nurture them, and use them for mutual benefit. This work has taken time and would be extremely difficult to imitate by other performing arts organizations (both existing organizations and new entrants).

Nurturing Stakeholder Relationships

This organization invests significantly in nurturing stakeholder relationships. One can see that through the care they take to be sure that they have a full understanding of individual and/or partner organizational needs. They connect with stakeholders on a regular basis. In limited instances, the organization uses surveys to better understand how audiences feel about the work. The way that Creative Stages relationship management is most effective is through personal interaction between members of the organization and external stakeholders. People who interact with this organization feel valued, feel included, and feel connected to Creative Stages. This appeared in the qualitative data. It also appeared in the quantitative component of the study. When study participants (i.e., Creative Stages’ audience) were asked if a 20% rate increase would dissuade them from attending, the unanimous answer was no. When the same question was posed with a 50% increase, participants indicated that they would think twice. This shows that the organization has built programs that audiences view as providing significant value for

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their money. It also shows that the value is in more than the program itself. It extends to the relationships that Creative Stages builds with stakeholders.

Creative Stages also views staff and contract labor as important stakeholders whose relationships are valuable. There were several responses in the data that indicated that the staff's view of the organization is an important lens for leadership to consider and they take the steps necessary to incorporate those views into the way they conduct business. Given the opportunity for further exploration, additional key stakeholders (e.g., grantors) would arise as being important in this regard as well.

Stakeholder relationship management is another core competency of Creative Stages. It recognizes the value of these groups and spends significant time and personal resources to nurture these relationships. Building the size of the stakeholder community plays an important role in contributing to their sustained success.

Social Sustainability

Social Sustainability is deeply rooted in this organization. One can see that they have built their organization on it. Children are the most powerless members of our society. Creative Stages has built an entire business around empowering the weakest members of our population through arts programs. They are particularly adept at serving the most vulnerable of that powerless group—those who benefit from additional support and adaptation. That really could mean any person. This organization intentionally serves stakeholders without access and with great need. They use the arts to address difficult social issues. The result of this work is the well-being of their key stakeholder group (i.e., audiences). This makes the world better.

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To be clear, Creative Stages is working through the WSYWAT list like everyone else. They have created a committee. They are starting a fund. They have adjusted their practices. They are doing what is being asked. Strategy responds to external forces. It adapts. One sees that adaptation in each and every turn, from identification of unmet stakeholder, needs through organizational integration. Programs are being delivered differently to reach their intended audiences more effectively. Salary transparency and elimination of degree requirements have become part of the hiring process to remove barriers for underrepresented communities. Racial diversity goals have been set for all levels of organizational employment. Developing minority artists into production leadership roles has become part of the artistic process. Social sustainability is a core competency of Creative Stages.

Limitations

This study has a number of limitations. First, this research assumes that social sustainability strategies like IDEA will impact stakeholders. This study expects that results on stakeholders would be found. They were and it is possible that bias was present because of the expectation that the strategy would have an impact. Further, because of the qualitative design of this study, the outcomes identified are based on participants' perceptions of the outcomes which are different from objectively measuring those outcomes independently.

The second is the sample itself, for several reasons. First, participants were limited to past and present executive leadership, members of the board of trustees, and audiences. Staff and contract labor members of the organization were not included to offer their perspectives. While both executive leadership and the board of trustees

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mentioned staff and contract labor views and where tensions arose, that does not offer the same level of understanding as receiving the information directly from the source.

In some cases, study participants fell into more than one group (i.e., audience and member of the Board of Trustees) and answered questions from both protocols. It is reasonable that engagement in the organization grows over time and therefore, the participants could speak to their experience through multiple lenses. Their participation was coded as being part of more than one group. There are some participants who indicated during the interview that they were part of more than one group, but in those early interviews, the researcher did not realize that this would be a theme and only asked the question protocol that they were initially signed up under.

Furthermore, because of the narrow definition of stakeholder being audiences in this study, other salient groups like donors, granting organizations, and partners were excluded from participation. There is not an opportunity to examine their views in this study.

Similarly, because an incentive of free tickets to opening night of the show was offered to audiences in exchange for participation and the request for participants came directly from the company (e.g., Creative Stages), audiences who responded were those who intended to return to the theatre's programs. Members of the executive leadership group and board of trustees group referenced their own experience with audiences whose expectations did not align with the artistic choices made in the plays that they saw. Those comments are discussed in the stakeholder norms section above. We know that there are people who chose not to return as a result of this strategy or, at a minimum, expressed concern about the direction. Those voices themselves were excluded from the sample

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because of the recruitment method employed. Intention to return was excluded from the results because of likely bias within the audience sample. Because the call for participation included free tickets to opening night, participants had already disclosed their intention to return by volunteering for the study.

Next, while there is some disability diversity present in the executive leadership sample (n=2), this group is overwhelmingly white women over the age of 50. Of the 11 participants in this category, one identified as male and one was under the age of 50. This company is not immune to the criticism of corporations in many industries lacking racial diversity in leadership positions. It has put forward aggressive goals to change that. Those future goals do not change who previously and currently hold positions of leadership within the organization.

Financial records of the organization were not part of the documents examined because they were not made available. Organizational 990s are available on [Guidestar.org](https://www.guidestar.org). Because the years available were during the pandemic, those years do not represent typical financial performance of this firm and were excluded.

This research also assumed that if IDEA was present, it would be recognizable to all stakeholders in the organization. This was proven false very quickly during the data collection process. Of ten audience members whose children had not aged out of programming, four had a child with a disability. Six had no specific accessibility needs. Of those six, one identified as Asian, and one identified as mixed-race. Audiences without accessibility needs for disability were largely unable to identify that the IDEA strategy was present. They could, however, identify that they saw people of all backgrounds in the building.

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Finally, the study is limited to one organization within the performing arts industry and some of the outcomes may be due to societal norms based on the geographical region within which the company is located. For example, concepts such as acceptance, reducing barriers, and meeting needs may be more readily accepted in this region than in other regions in the United States and are, therefore, standard operating procedures for organizations in this region. However, there is evidence to contradict the geographical norm argument. A direct competitor of this organization's staff recently published an intervention to the leadership and board of that organization accusing them of among many other infractions, "direct and systemic racial harm." Another nearby theatre, in the same neighborhood that primarily serves adult audiences, put forward a hasty statement in the wake of the WSYWAT conversation and alienated several board members. Finally, a mom in the region, in a series of social media posts, discussed the difficulty that she encountered attempting to get accommodations for her child during a summer camp experience offered by a competitor operating in the same region. Ultimately, she removed the child from the camp because they refused accommodations.

Theoretical Implications

Both stakeholder theory and RBV provided complementary theoretical bases for this study. By adopting this approach, this study is among the few to apply these complementary theoretical lenses to examining social sustainability strategies in the performing arts industry.

Creative Stages' balanced approach to stakeholder management has resulted in improved well-being. That approach is apparent through their continued investment in

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developing new plays told by authentic voices, their intentionally diverse casting choices, and their approach to accessibility in the classroom, onstage, and in the audience

RBV predicts that firms develop resources that are difficult to replicate that lead to strategic advantage. We see that through the core competencies that Creative Stages has developed. Effective storytelling, artistic risk-taking, building partnerships, stakeholder relationship management, and social sustainability combined create a competitive advance for this organization in an industry with a bleak financial outlook.

Categories of external drivers behind the adoption of IDEA were identified. Those are unmet stakeholder needs, stakeholder pressure, meeting stakeholder needs, and stakeholder norms.

Leadership advocating for issues of social sustainability, effective financial resource management, and diversifying partners were discovered as important components of making social sustainability possible.

Quality programs and having the right people in place to meet needs were identified as critical structural components of the successful implementation of sustainability strategy.

This study helps us to understand the ideal cultural environment that leads to the successful implementation of social sustainability strategy. Ethics-driven culture, culture of learning, and inclusive culture are the core pieces of an organizational culture primed for the adoption of social sustainability adoption.

Through this work, the ways in which organizational reputation is impacted through social sustainability strategy were identified. Authenticity, visibility, diversity, and access are the parts of that reputation that see improvement through this work. The

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identification of those markers is a critical next step to measuring their impact on firm performance.

Individual-level indicators of social sustainability outcomes have been identified through this study. Acceptance, belonging, empowerment, feeling safe, feeling connected, feeling included, and feeling valued are all early indicators of well-being that can help us understand how effective a sustainability strategy is.

Effective design and implementation of a social sustainability strategy in this performing arts literature resulted in several outcomes previously identified in the social sustainability literature, namely, equity/equal social status, access, social justice, and well-being (Cuthill, 2010; Godschalk, 2004; Hans-Böckler-Stiftung, 2001; Sachs, 1999; Thin et al., 2002).

Practical Implications

This organization is doing well. They have developed a long track record of early identification of unmet stakeholder needs. Creative Stages' approach to building organizational capacity to meet those needs is well established and has resulted in quality programs delivered in ways that are accessible to stakeholders. This is a direct result of their first-mover advantage in designing and implementing a social sustainability strategy. Furthermore, they recognize that for continued success their strategy needs to be dynamic. Accordingly, they have successfully redesigned their strategy such that it addresses newly uncovered market needs. They treat their organization like a business and have divested several programs that are no longer in alignment with societal views and no longer serve the market in the ways that were initially intended. When programs have potential but are not performing as intended, they have pivoted and re-oriented their

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strategic direction by reallocating their activities and resources. Full integration into organizational philosophy occurs when a program no longer needs intense focus to be effective. Strong organization alignment with the mission and ethical behavior and leadership's view of the importance of these initiatives drive the process.

The core competencies that Creative Stages has developed effectively support its strategic market position and are difficult to imitate. Other organizations hoping to adopt social sustainability strategies by infusing IDEA into their programs should look to the approach taken by Creative Stages as inspiration. Recognizing the roles that leadership, organizational structure, and organizational culture play in the successful adoption of the strategy would serve other organizations well. Leaders need to say, "this is important." Organizational structure needs to be built or capacity expanded to be able to support the important work. Organizational culture needs to welcome initiatives of this nature and allocate appropriate resources to realize the benefits of incorporating it.

One area that should be examined and developed is measurement of the social sustainability outcomes associated with their work. This study identified several, acceptance, belonging, empowerment, feeling safe, feeling connected, feeling included, and feeling valued. Measuring and tracking these outcomes over time could result in further improvement of organizational reputation and provide a platform on which to advocate for resources to improve reach and effectiveness.

Further, an initial assumption of this study, which was quickly proven false, was that the IDEA strategy would be recognizable to all stakeholders. It became clear, early on in data collection, that communication to audiences about IDEA came primarily through extensive networks of trusted professionals and friends who had engaged with

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the organization. That communication extended nearly exclusively to audiences with specific needs. Audiences who were not looking specifically to meet accessibility or visibility needs were largely unaware of the work that this company does to meet those needs. Additionally, while images and language on social media and the website showcase diversity, those do not effectively communicate the strategy and work done by this company. This is also a fine line to walk, putting IDEA too front and center could be viewed as performative.

One thing that may aid performing arts organizations' ability to discuss their contributions more effectively is putting in place a system to measure the work being done on a regular basis. This should include work toward specific goals like fostering a sense of belonging and well as outcomes that result from that work. That could provide a platform on which discussions about the work and impact could be had with audiences while ensuring that the organization is not perceived as jumping on the social sustainability checklist bandwagon.

Future Research

This initial qualitative study is a small step towards building our understanding of key drivers that promote the adoption of a social sustainability strategy, factors that lead to the successful implementation of that strategy, and outcomes for a key stakeholder group in a performing arts organization while also providing fertile ground for future research on this topic. The findings from this work need to be tested and expanded in many ways.

First, an examination of the internal and external factors involved in the adoption of IDEA needs additional study to determine if there is commonality across organizations

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and industries. We should also evaluate the relationship between not-for-profit organizations and for-profit entities in this context to see if the factors vary. It is possible that the dichotomy between mission-driven and profit-driven impacts customer outcomes.

Analysis of leadership styles that can be particularly effective in designing and implementing sustainability strategy in a wide variety of contexts would be particularly valuable. Examination of leadership traits that lend themselves to this work would be an interesting next step. Furthermore, we should study how effective financial resource management is achieved.

More work is needed to interpret the relationship between ethics-driven culture, culture of learning, and inclusive culture in an organization primed for social sustainability adoption. Scales should be developed to understand high and low scores for each. These will help organizations to understand how to measure their readiness for the adoption of social sustainability. An empirical examination across industries should be done.

Quantitative analysis should be used to examine what financial sustainability looks like in organizations that adopt social sustainability. This would be especially useful in a not-for-profit environment because earned revenue does not always cover operating expenses. Contributed income often covers the gap. There are certainly headwinds for social sustainability and fund-granting organizations are likely to support organizations whose outcomes align with their initiatives. Understanding where those funds to support are coming from in this context could be very useful to organizations operating within the not-for-profit space.

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Further research that seeks to understand how the sub-components of organizational reputation are related is important. Authenticity, visibility, diversity, and access should have scales developed and be empirically tested to better understand their relationship to reputation in a social sustainability context.

Additional studies to understand how the individual level indicators of well-being connect to one another will be particularly beneficial. Acceptance, belonging, empowerment, feeling safe, feeling connected, and feeling valued should each be examined in the social sustainability strategies of organizations operating in different contexts to identify the range and impact of each on overall well-being. Scales should be developed and tested across industries.

Friends should be further examined to understand why perceptions of friendship from implementing a social sustainability strategy differ in different contexts. Also, it would be interesting to examine what role time plays in the development of this perception. Further research that creates scales to assess and track equity, access, social justice, and well-being is necessary. These measurement tools should be applied broadly across industries.

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Appendix A

Doctor of Business Administration Program

College of Business Administration
 105 Anheuser-Busch Hall
 St. Louis, Missouri 63121-4499
 Telephone: 314-723-1345
 E-mail: stheis@umsl.edu

Informed Consent for Participation in Research Activities

Assessing Sustainability Strategy: A Stakeholder Approach

Participant _____ HSC Approval Number _____

Principal Investigator ___ Sara Theis _____ PI's Phone Number ___ 314-723-1345 _____

Summary of the Study

This is a research project conducted by Sara Theis, DBA student. The purpose of the study is to understand the outcomes of Inclusion, Diversity, Equity, and Accessibility (IDEA) strategy on various stakeholders. Your participation in this study is voluntary. The study will require you to participate in a 30-120 minute interview that will be recorded via Zoom. Risk is expected to be minimal and may include boredom or fatigue. There are no expected benefits from your participation.

1. You are invited to participate in a research study because you were referred by the staff and you have in some way participated in programs created by (ORG NAME), are or have been employed by the company itself, or are a member of the company's Board of Directors. This exploratory study is being conducted by Sara Theis, a DBA student at the University of Missouri-St. Louis. Dr. Bindu Arya, Professor, is the advisor for this study. The purpose of the study is to explore your experiences with (ORG NAME) and its strategies and programming. Your participation in this study is voluntary. The study will require you to participate in a 30-120 minute interview that will be recorded. There are no expected or foreseeable risks or discomforts. There are no expected benefits from your participation.

Research Team Names and Affiliations:

- Sara Theis, DBA Candidate at University of Missouri-St. Louis and Associate Professor, Millikin University
- Dr. Bindu Arya, Professor at University of Missouri- St. Louis

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2. a) Your participation will involve:

- The interviews will be approximately 30-120 minutes each using Zoom;
- Interview audio will be recorded and transcribed for subsequent analysis by the research team;

Up to 50 individuals may be involved in this research.

b) The amount of time involved in your participation will be a 30-120 minute interviews using Zoom.

3. The risks associated with this project is expected to be minimal and may include boredom or fatigue. Additionally, there is a risk of loss of confidentiality. That risk will be minimized through the use of pseudonyms and secure storage of interview transcripts.
4. There are no direct benefits for you participating in this study.
5. Your participation is voluntary and you may choose not to participate in this research study or withdraw your consent at any time. You are also able to decline to participate in specific questions if you so desire. You will NOT be penalized in any way should you choose not to participate or withdraw.
6. We will do everything we can to protect your privacy. As part of this effort, your identity will not be revealed in any publication that may result from this study although quotes from this interview may be included in the final paper/publication. In rare instances, a researcher's study must undergo an audit or program evaluation by an oversight agency (such as the Office for Human Research Protection) that would lead to the disclosure of your data as well as any other information collected by the researcher. This interview is being recorded.
7. If you have any questions or concerns regarding this study, or if any problems arise, you may call the Investigator, Sara Theis (314-723-1345). You may also ask questions or state concerns regarding your rights as a research participant to the Office of Research, at 314-516-5897.

I have read this consent form and have been given the opportunity to ask questions. I will also be given a copy of this consent form for my records.

Do you have any questions?

Do you understand the nature of participation and do you agree to participate? Verbal reply requested

Appendix B**Question Protocol****General Demographic Information Collected of All Participants:**

Role:

Age:

Gender:

Race:

Ethnicity:

Do you identify as living with a disability? If yes, what is the nature of the disability?

(For parents ONLY) Does your child identify as living with a disability? If yes, what is the nature of the disability?

Do you identify as a member of the LGBTQ+ community? If yes, in which way?

(For parents ONLY) Does your child express their gender as male, female, or non-conforming?

How long have you been involved with Creative Stages?

Audiences/Parents of Participants:

1. How did you and/or your child become involved with Creative Stages? What was your and/or your child's first experience? How did it go? Did your child make a friend?
2. How often does/did you and/or your child get involved with programming at Creative Stages? As a student? As an audience member? What is the total number of shows or classes you have attended? Is there a specific topic that interests you or your child?

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3. Why did you choose Creative Stages programming over other options?
4. Do you believe that Creative Stages places a focus on inclusion, diversity, equity, and access? How do you know?
5. Thinking about the last time you engaged in programming at Creative Stages, was a focus on inclusion, diversity, equity, and access present? How was it shown? If it was absent, why do you believe it was absent?
6. In which ways were your child impacted by Creative Stages' focus on inclusion, diversity, equity, and access?
7. Rate your satisfaction with the Creative Stages' diversity programming on a scale of 1-5 with 1 being very low and 5 being very high.
8. How likely are you to recommend Creative Stages programming to other parents on a scale of 1-5? 1 is not very likely, and 5 is very likely.
9. How likely are you to purchase tickets or enroll in a new class on a scale of 1-5? 1 is not likely, 5 is very likely?
10. How often do you attend programs or engage with programming at Creative Stages? 1 – yearly, 3 monthly, 5 weekly?
11. What would motivate you to go more often?
12. Imagine if Creative Stages increased its fees by 20%, on a scale of 1-5, how likely would you be to continue attending? 1 is not very likely. 5 is very likely. What if the increase was 50%?
13. How can Creative Stages improve in this inclusion, diversity, equity, and access?
14. Do you have the same expectation of other similar arts companies? Why? Why not?

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Executive Leadership and Board of Directors:

1. How did you become involved in Creative Stages? What first brought you in?
Was the experience positive, negative, or neutral?
2. Thinking about the current projects you are working on at Creative Stages, is there a focus on inclusion, diversity, equity, and access present? How did you see it manifest? Why do you believe it was absent?
3. How are inclusion, diversity, equity, and access defined at Creative Stages?
4. How do you ensure that your IDEA strategy aligns with what audiences want and market trends?
5. How did you make sure that the needs of key stakeholders were met to remain financially viable while you implemented this strategy?
6. How do you see this IDEA strategy implemented on a short, medium and long-term basis?
7. How does the IDEA strategy at Creative Stages *impact* Audiences?
8. How do you know that the IDEA strategy at Creative Stages is creating a positive *impact* on Employees? Artists? Contractors? Audiences?
9. Do you see opportunities for improvement in Creative Stages' IDEA strategy?
What are they? What will the impact be if those changes are made?
10. How does Creative Stages differentiate itself from other Theatres for Young Audiences? Why is this important?
11. What are 3 key learnings, experiences, or qualities that other performing arts organizations can emulate from you that positively elevate their programming, offerings, and audience participation?