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UNDERSTANDING A NONPROFIT FORM OF ORCHESTRAL MUSIC EDUCATION THROUGH THE ECOLOGICAL POLITICAL METAPHOR: THE CASE OF EL SISTEMA OKLAHOMA

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UNDERSTANDING A NONPROFIT FORM OF ORCHESTRAL MUSIC EDUCATION THROUGH THE ECOLOGICAL POLITICAL METAPHOR: THE CASE OF EL SISTEMA OKLAHOMA

A DISSERTATION APPROVED FOR THE
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Dedication

I dedicate this work to individuals everywhere who are committed to addressing social and educational injustices. A central goal of this work is to illuminate how one such community came to address the inequity of educational opportunities

Acknowledgements

I would like to personally thank each of my committee members. Thank you for investing time in me.

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Robyn, Laura, and others at El Sistema Oklahoma (ESO), thank you for welcoming me on site and participating in this research! I respect your passion and commitment to the kids and families of ESO. In writing up this research, I endeavored to provide an authentic picture of the work you do and its significance. I undertook this work with great responsibility and care.

This dissertation journey has been a humbling experience. In many respects, I endured the process of this dissertation. In Romans 5:3-4 the Apostle Paul writes, "…but we also rejoice in our tribulations, knowing that tribulation produces perseverance; and perseverance, character; and character, hope." I asked God for strength, clarity, and focus and He delivered me. In completing this work, I learned the importance of discipline and hope renewed.

Lastly, thanks to my family for your patience. You may not have realized it, but your love and affection gave me strength and motivation to complete this work.

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Abstract

This is an educational studies dissertation substantiated in an emergent, empirical case. Over the past few decades, the fine arts, including music education, are increasingly becoming de-emphasized in PK-12 school environments. In this case, I examine the existence of El Sistema Oklahoma (ESO), a community-focused nonprofit organization wit the mission of "transforming lives through music." ESO is one of about 130 El Sistema-inspired affiliates operating in the United States. To date, existing research on El Sistema has largely been focused on pedagogy and music theory, not policy matters. At the time of this research, ESO completed its third years of operations. It serves approximately 220 kids in Oklahoma City Public Schools, the largest and most diverse school district in the state

This is an instrumental case study to better understand how actors and institutions in a given community address the defunding of music education. In this particular case, founders had strong personal relationships with individuals representing two anchor institutions (Oklahoma City University (OCU) and St. Luke's United Methodist Church) both of with experience in after school programs and in supporting the arts. Stakeholders did not have strong ties to the third anchor institution represented in the case (Trinity International Baptist Church). It was selected for two reasons: its size and geographic location.

I provide a thick description of the environment in which the case operates, paying particular attention to the sociopolitical forces in the local community, including the issue of school choice, the lived experience of the founders, OCU, OKCPS, and the role of the Oklahoma City Public School Foundation. My engagement with the case

spanned six months. During that time I employed multiple methods to gain a robust understanding of the case. Sources of data include interviews, documents, artifacts, ethnographic fieldwork (participant and direct observations), and memoing.

Two theoretical lenses guide this inquiry. First, the ecological-political metaphor (EPM) allows me to analyze the case in terms of policy formation in the local community. I treat stakeholders' investment (or de-investment) of resources and capital as playing the game of orchestral music education. Through the qualitative method of constant comparison, eight themes emerged through the EPM.

The second theoretical lens focuses on whose social need is being addressed through the ESO. I draw upon the typology of Kettner, Moroney, and Martin (2008) to respond to this question. They contend there are four types of need: perceived, expressed, relative, and normative. I examine qualitative data sources, school site characteristics, mobility rates, and the evolution of ESO services to determine what form of need is addressed. I arrive at the assertion that ESO places values on the social and cultural capital of parents/guardian, thereby allowing for increased political mobilization of educational matters related to their children. I then consider how this relates to the Deweynian notion of a public.

Given the current sociopolitical environment of defunding longstanding social services, this case study is timely. It is plausible that we, as a society, may come to rely more upon philanthropy and the nonprofit sector to address gaps in social and educational services. This case demonstrates how founders and stakeholders galvanized the local community around the need of increased educational opportunities, such as orchestral music, for children in a high poverty area. ESO has received far-ranging endorsements

from the nonprofit and music education community and is in the process of becoming self-sustainable through grant

Chapter 1: Introduction to the Research

With varied forms of guidance and support from the nonprofit sector, communities are experimenting with and piloting diverse, alternative forms of education that stand in contrast to formal, traditional education models. These educational structures innovate new solutions or tackle existing problems in unique ways. They tend to include multiple stakeholders, thereby representing a plurality of views. Above all, and consistent with the superordinate mission of the nonprofit sector, they seek amelioration through programs and initiatives that take aim to provide opportunity structures, often to disadvantaged and historically oppressed communities that lack such opportunities.

This research examines alternative educational forms in light of two fields of inquiry that, due to sociopolitical forces, are increasingly overlapping: PK-12 and nonprofit studies. The domain of inquiry this research centers upon is alternative educational forms occurring in community settings, as philanthropic products. While disparate theoretical conceptions of such alternative forms of educational agencies exist, there is not a unified perspective in appreciating how they come to fruition and their implications to policy and beyond. Contemporary educational theorist Jane Roland Martin (2011) broadly conceives of education as product of an array of formal and informal educational agencies. As communities are ecological systems that vary widely in terms of size, resources, needs, assets and liabilities, so too are the host of alternative educational forms that emerge. Thus, it is further necessary to limit the scope of this research. I accomplish this task by adding a third stool as a field of inquiry: PK-12 music education.

Music education, as well other fine arts, can been regarded as a public good (Throsby, Withers, Shananhan, Hendon, Hilhosrt, & van Straalen, 1983) and has long been regarded as a foundational PK-12 curricular element to developing well-rounded citizens (Mark, 2008). Despite the importance of the arts, No Child Left Behind and the resulting sociopolitical environment of high stakes testing has significantly contributed to a de-emphasis of the arts in public education (Greene, 1995; Heilig, Cole, Aguilar, 2010), especially in high poverty schools. As compared to the other arts, music education has been somewhat insulated from this curricular attrition, but within the past decade it too has decreased (Gullat, 2007). The nonprofit sector has a long history of supporting public goods such as the fine arts. More recently however, the increased marketization of public education has provided various institutional structures for actors to influence public education by delving into PK-12 policy and politics (Reckhow, 2012).

Problem Statement

While the focus of community educational initiatives are far-ranging, a cadre of recent nonprofit initiatives have centered upon arts and music education (Morgan, 2013; Noblit, Corbett, Wilson, & McKinney, 2009), as they have become increasingly de-emphasized in the public school curriculum. As school districts allocate limited resources towards accountability efforts and workforce development, the fine arts (Greene, 1995), including music education (Elpus, 2014; West, 2012), are widely cited as curricular and budgetary victims. Indeed, a host of researchers have examined the curriculum wars, as they relate to the arts (Kushner & Cohen, 2010; Murray, 2008). By drawing upon a broad view of education, the problem this instrumental case study will

address is diverse community actors converging upon the normative need of music education in high poverty, urban communities.

Increasingly, nonprofit organizations are becoming engaged in collaborations with community coalitions (Berkowitz, 2001) and with formal educational institutions, including PK-12 schools (Mitra & Frick, 2011). Public schools are constrained by budgets, especially in high poverty areas. PK-12 funding has become a complex algorithm that considers student demographics among a host of other factors. In general, however, state funding accounts for 51% of funding, local property taxes 41%, and federal funding is 8% (Rubenstein & Warner, 2017). Meanwhile, actors in the nonprofit sector have deep financial resources to fund programs and services, particularly those programs and services involving the arts (Morgan, 2012). In addition, nonprofit structures allow for loose coupling (Weick, 1976), which affords nimbleness in addressing needs and encourages low barriers to access. This trait makes nonprofits attractive partners for PK-12 schools, which operate in a top-down fashion. Nonprofits, then, can be viewed as mechanisms by which stakeholders innovate alternative educational solutions to the arts, including music, and potentially beyond.

Despite the prevalence of nonprofit-directed efforts towards education in community settings, there is a dearth of research considering whether they are democratic and how they may contribute to the mobilization of community actors. On one hand, an argument can be made they serve a functional purpose for citizens to identify needs and develop and implement programs, thereby potentially affecting public policy through innovation. On the other hand, Hardin's (1974) conception of lifeboat ethics is a useful metaphor that illustrates the resource distribution problem of

too many social inequalities and not enough nonprofits to address them. Regardless, at this moment communities are creating diverse forms of education across a host of environments, especially music and other fine arts.

As this research considers alternative forms of education occurring in community settings, it is necessary to scrutinize the concept of policy. Fowler (2013) notes the term policy has multiple meanings. The term policy is derived from political science, but has been applied in a host of settings, including education, public affairs, and perhaps its broadest application is simply social policy. Taylor (1997) notes policy is a value-laden concept that may conjure power differentials between those who develop, control, and implement it, as well as those who are powerless in its wake.

Traditional definitions of policy view curriculum, including the arts, as a product of governance decisions (Crosby & Bryson, 2005) or outputs (Kruschke & Jackson, 1987). For the purposes of this study I adopt the view of Larrue, Varone, and Hill (2007), who consider policy as, "a series of intentionally coherent decision or activities take or carried out by different public—and sometime private—actors…with a view to resolving in a targeted manner a problem that is politically defined as collective in nature (p.24). This study examines local policy efforts of various public and private actors to redress music education de-emphasis in PK-12 schools

El Sistema is a worldwide phenomenon of orchestral music education, which loosely translates to "the system." It is a global music education movement described as "not a program or a curriculum; it is an inquiry" ("El Sistema: In the U.S.," n.d.). Venezuelan educator and activist José Antonio Abreu developed the program in his home country in 1975. It has rapidly diffused across the globe, spreading like wildfire.

At present, there are over 120 El Sistema sites in the United States, and over 1,000 programs across 55 countries in the world (El Sistema: In the U.S.," n.d.). Indeed, this is a global phenomenon, as it has presence in every continent except Antarctica. As could be expected with its surge in notoriety, there is a growing list of research examining the phenomenon that is El Sistema.

To date, research on El Sistema has been primarily limited to the domains of music education (Fessler, 2013; Lynch, 2013; Shoemaker, 2012), critical theory (Baker, 2014) and its social implications (Lui, 2012; Turnstall, 2012). However, the program has not been explored in light of the intersection between educational policy and the nonprofit sector. This is noteworthy given the current sociopolitical climate of high stakes testing, common core, and the devaluation of the arts. Schools in some states are allocating up to 20% of their budgets on the process of testing and preparation materials (Ravitch, 2013). The arts (musical, performing, and visual) and physical education are among the first curricular victims in this era of heightened accountability and limited resources. Thus, the de-emphasis of the arts may continue, if not worsen. Considering the climate of marketization in education, as well as increased nonprofit involvement in PK-12 education, it is reasonable that community-based arts programs such as El Sistema may gain more traction.

For the host of reasons outlined above, it is important to understand how alternative forms of education, particularly music education, are conceived, developed, and implemented. Given these issues, questions abound. Do such programs work in collaboration or competition with the public schools? Do they represent the needs of the community or stakeholders in the community? Do they evolve over time? If so, how

and what drives them to change? In the next section, I narrow the scope of this dissertation by addressing the purpose of this research.

Purpose of the Research

This research seeks to understand how and why diverse stakeholders galvanize around an alternative form of orchestral music education, which represents a need not being addressed by existing forms of institutionalized education existing in a community setting. As educational change, politics, and policy formation do not occur within a vacuum, the tension between vision and pragmatism may best be illustrated by case studies, which test what is achievable. In order to accomplish the task of understanding how communities address educational need, I employ a case study design to understand how El Sistema Oklahoma (ESO), a 501(c)(3) after-school program, redresses the need of music education. In doing so, I employ two theoretical lenses to ask different, but related questions. First, I seek to understand how actors mobilized around the problem of lack of orchestral music education. I accomplish this through Long's (1958) conception of the ecological-political metaphor. Second, I interrogate what form of social need is being met through the organization of ESO. In the last chapter of this case, "Implications," I examine the policy implications of the case.

The structure of El Sistema favors independent control. No national curriculum is available, but there are three cornerstones of the program, which serve as a loose philosophy of education. They are the nucleo (the hub where students practice and grow), playing as an orchestra, and sharing the experience of music with others, i.e. the community, through frequent performances (Baker, 2014). Student practice is rigorous, as students in El Sistema USA programs typically meet 5 days a week and practice 3-5

hours daily. They practice in instrument groups, are encouraged to work in student-led practice, study music theory, and participate in orchestral practice.

Each El Sistema program is a unique manifestation of its community's strengths, resources, and needs. It is not a music pedagogy, but rather an approach. On the surface, El Sistema Oklahoma could be seen as free classical music education geared primarily towards communities and children who lack equal opportunity. At a deeper level, however, El Sistema is an ideology that seeks transformative change in individuals, families, and communities through music. In this view, music, the nucleo (the vibrant physical site of El Sistema) and the orchestra (the defining characteristic of community) serve as mediums for political action. Clearly, each is a unique manifestation of the community in which it resides. To understand the complexities of El Sistema, it makes sense to conduct an in-depth examination of a singular program, including the context in which it operates.

ESO is an El-Sistema inspired program, which at the time of this research had recently completed its third year of operational existence. It was created through a partnership between two anchor institutions. The first is faith-based, St. Luke's United Methodist Church, and the second is a higher education institution, Oklahoma City University. This research frames ESO as an alternative educational form designed to redress the normative need of music education in a high poverty, urban school choice district. Thus, this research focuses on how ESO operates within its ecosystem including the existing community structures that comprise it, namely PK-12 schools.

In this research, actors comprising the case represent three policy areas: faith-based, higher education, and public schools. A burgeoning community literature on the

importance of diverse stakeholders in educational initiatives exists (Berkowitz, 2001; Myers, 2013). I examine faith-based actors (two churches) through the perspective of social action ministry (Jacobsen, 2001, Pierce, 1984). Meanwhile, academics have questioned the moral responsibility of higher education institutions in serving the communities in which they reside (Benson, Harkavay, & Puckett, 2007; Moxley, 2013). ESO collaborates with the largest school district in the state, Oklahoma City Public Schools, to provide services to approximately 220 children aged 8-16 across fourteen school sites. This case presents a unique opportunity to examine how these policy actors mobilized through ESO, and how they relate to each other, thereby developing community capacity.

This case can teach us much about early stages of community educational structures. For example, a philanthropically-focused couple provided the seed money and an initial vision for El Sistema Oklahoma (ESO). The decision was made to develop the intervention in a high poverty swath of Oklahoma City Public Schools (OKCPS). They leveraged the network of two high capacity social institutions (university and downtown church). For the first two years, ESO operated under the financial umbrella of the church. In its third year, however, ESO became organized as a 501(c)(3), cementing its role in providing a public good and thereby amplifying its ability to receive funding from a host of sources.

Research Questions

This research is an educational studies dissertation substantiated in an emergent, empirical case. I employ qualitative methods to appreciate theoretical concepts guiding this research. As qualitative research can become unwieldy, research questions serve the

important purpose of providing the researcher focus. Creswell (2010) cautions theoretical focus is one of the fundamental tensions of qualitative research. Stake (1995) notes the importance of questions in providing guidance, yet in instances which require extensive fieldwork, they should also allow flexibility for the researcher to be open to other concepts and alternative solutions.

As qualitative research is inductive in nature, as opposed to deductive, its overarching goal is to generate understanding and meaning, as opposed to assessing causality. Qualitative research, however, should not be viewed as unguided or open-ended; instead, sound research questions and relevant literature are helpful practices to limit the scope of research, thereby contributing to a sound empirical study (Creswell, 2010). In Table 1, I present the research questions that guided this research.

	Question
Research Question # 1	*How can this case be understood through the ecological-political framework*
Research Question # 2	*What form of social need does ESO meet?*
Research Question # 3	*What are the policy implications of the case?*

Table 1: Research Questions Guiding the Inquiry

Operationalization of Terms

To ensure that readers understand my view of fundamental definitions, I operationalize the following terms: nonprofit organization, community, and collaboration, and transdisciplinary.

Nonprofit Organization. 501(c)(3) organizations have come to be referred to as public charities, which is meant to highlight the importance of IRS Provision 26 USC § 170, which allows for financial contributions to 501(c)(3) organizations to be tax deductible,

providing specific criteria are met. In 2011, 501(c) (3)s comprised a staggering 1.1 million organizations of the 1.6 million various 501 (c) sectors (:"The Charitable Sector", n.d.). It should be noted this figure does not include the some 327,000 registered religious congregations that also file with the IRS. The system used to categorize 501(c)(3) organizations has been regarded as faulty (Lampkin, Romeo, & Finnin, 2001). Despite this failing, IRS data from 2010 shows that 21% of all charities self-select education as their primary category (Figure 1).

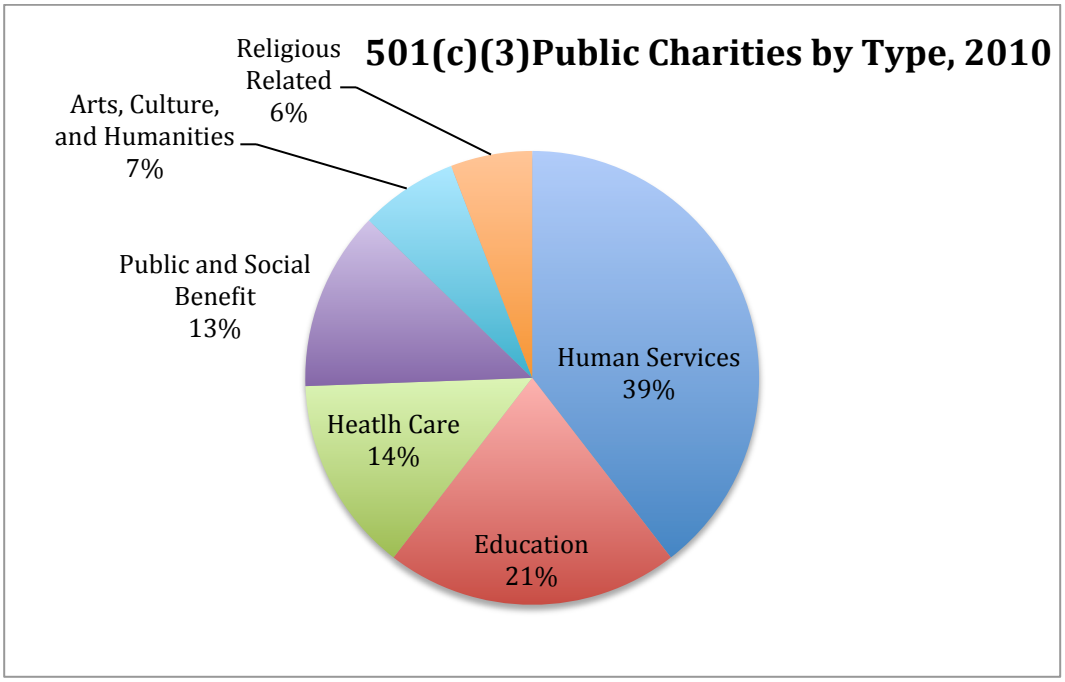

Figure 1: 501(c)(3) Public Charities by Type in U.S. 2010

Community. Through a robust discussion, Leventhal, Brooks-Gunn, and Kamerman (1997) contend that researchers as a whole fail to properly operationalize the term "community." This is problematic in social and applied research, as communities are often the settings in which data are collected. They present a three-pronged typology of place, space, and face in identifying community. Social science researchers most frequently adopt the sense of place (geography) when defining community, as it lends

itself to quantification through the categorization of variables (e.g., Putnam, 2001). This research tentatively adopts the straightforward, geographically-based definition of Dan de Put (2008), which is "people with common interests living in a particular area" (p. 163).

Anchor Institutions. Friedman, Perry, and Menendez (2014) consider anchor institutions as those that are integral to the local community. For them, such institutions are vital to economic, cultural, and social well-being of community members. They consider universities, churches, and hospitals to meet these criteria. They also note that long-standing civic organizations may meet these criteria, provided they play key roles in community development. Three institutions in this case meet this definition: Oklahoma City University, St. Luke's United Methodist Church, Trinity International Baptist.

Collaboration. This research involves multiple community actors, so it is necessary to make a clear distinction between collaboration and partnership. Gray (1989), regards collaboration as a "process through which parties who see different aspects of a problem can constructively explore their differences and search for solutions that go beyond their own limited visions of what is possible" (p. 5). Light (1998) notes "partnership" has become commonplace and falsely used in place of collaboration. For Light (1998), partnership is a formalized form of collaboration. In this research stakeholders and the social institutions they represent in the community (place) are collaborating, which is the sharing of resources. This case includes three deeply seated anchor institutions in the local community that have engaged in a full-blown partnership

complete with MoUs (memorandums of understanding), which is evidence of their commitment to the object of the case, El Sistema Oklahoma.

Transdisciplinary. As this research seeks to address the problem of lack of music education across disciplines, it is necessary to properly define terminology of cross-discipline work. The terms multidisciplinary, interdisciplinary, and transdisciplinary are often used interchangeably, which is incorrect. Multidisciplinary compares and contrasts two areas in an additive manner. This research transcends three perspectives, so it is not multidisciplinary. Interdisciplinary combines two or more disciplines into a new level of integration. Transdisciplinary, however, requires two or more disciplines transcending each other to form a holistic approach (Rosenfield, 1992).

According to Rosenfield, transdisciplinary research is recognized for its ability to provide a systematic, comprehensive understanding across disparate realms, thereby providing a robust means to conduct analytical work. This research meets her definition as not only do I combine three perspectives (educational policy studies, nonprofit studies, and music education), but I seek to integrate them into a new form of understanding. This research is trenched in the view that current conceptions of education are too narrow and often fail to account for the wide range of community factors contributing to alternative forms of education. This view implies the representation of multiple disciplines.

Educational Policy. Fowler (2013) notes the term policy has multiple meanings. The term policy is derived from political science, but has been applied in a host of settings, including education. Educational policy is a value-laden concept that may conjure

power differentials between those who develop, control, and implement policy, and those who are powerless (Taylor, 1997). Thus, it is important to define it.

For the purposes of this study I consider policy as, "a series of intentionally coherent decision or activities take or carried out by different public—and sometime private—actors…with a view to resolving in a targeted manner a problem that is politically defined as collective in nature (Knoepfl, Larrue, Varone, and Hill (2007), p.24).

Situating the Study

In this section, I situate this research within the three fields of study guiding this inquiry. In doing so, I trace historical developments in each of the fields, in order to arrive at present-day perspectives, thereby providing context and setting the stage for this research. It should be noted that this section serves a different purpose than the literature review, which is placed in chapter two. There, I review existing research, as well as theoretical concepts and philosophical underpinnings informing this research.

Educational policy and the ESEA. Institutionalized PK-12 education has always been in an identity crisis of sorts. Compulsory education is a government service, but it has historically been under the purview of state and local control. David Labareee (1997) insists the common school movement and subsequent policies can be understood in terms of three broad goals of public schooling: democratic equity, social efficiency, and social mobility. A historical review of PK-12 policy and curriculum then can be understood as examining a tension between these three goals.

The Elementary and Secondary Education Act (ESEA) of 1965 provided the first systematic legislation to allow federal involvement in PK-12 education. It

coincided with the Lyndon B. Johnson's Administration on the War on Poverty, thereby forever linking education and social services. In its 1965 passage, it contained six sections, which are referred to as Titles I through XI. Title I of the ESEA, for example, sought to improve the academic achievement of the disadvantaged, thereby promoting educational equity. This legislation provided policy structure for schools to seek address future social problems. As schools are not equipped to address such needs, they often contract out services to the private, nonprofit, or other government sectors to fill these socially-defined gaps (Honig, 2006). Examples include food service, health (such as vision and hearing screens), and other services based upon various community needs which are dynamic and change over time. Thus, community partners have been relied upon, due in part to their ability to be responsive in ways that the bureaucracy of the government is not designed to be. Since 1965, Congress has repeatedly reauthorized the ESEA and occasionally added amendments such as aid to handicapped children (revision to Title VI in 1966) and bilingual education (Title VII in 1967). While local and state control have been largely retained, through the ESEA the federal government has the ability to address social issues that are deemed educational.

Effects of accountability movement . At the peak of the Cold War, the 1983 landmark congressional report *A Nation at Risk: The imperative of education reform* sounded the alarm that American students were lagging behind their Soviet counterparts. This report served to usher in a new era of education reform in which PK-12 education became drawn into the forefront of political debate and rhetoric. The George W. Bush Administration's 2002 reauthorization of the ESEA, the No Child Left Behind (NCLB) Act, sought to increase academic rigor by placing increased emphasis on testing and

accountability. One of the many latent consequence of the accountability movement has been the de-emphasis of music education. This is due in part to increased instructional time on core subject areas, as well as decreased funding of the arts.

Given their function of filling social gaps, nonprofits represent a unique means for members of society to create and introduce educational innovations. Through a case study approach, this research seeks to gain a deeper appreciation of factors involved in community mobilization around music education. Doing so provides contemporary insight into this notion of nonprofit organizations as mechanisms to address need through innovative strategies. Appreciating the complexities of this case may help identify promising practices and by extension may serve to shape public policy on matters of community involvement in music education.

De-funding of public education. Given the current sociopolitical environment of reduced funding of schools, it is likely that nonprofit and other community organizations may play increased roles in providing educational services. PK-12 budgets continue to be slashed. As an example, after adjusting for inflation, the state of Oklahoma has reduced funding for three consecutive fiscal years (2013-2016). Moreover, state aid is 26.9% less than it was in 2008 (Eger, 2016). Deinstitutionalization of services can result from decreased resources. Hum (2010) notes nonprofits likely play increasing roles in filling gaps in education, as programs and services continue to become decentralized (Hum, 2010).

The Nonprofit Sector: A snapshot. The nonprofit sector is often referred to as the third sector of society, while the private and government sector round out the other two. This denotation speaks to the breadth and prevalence of nonprofit institutions in shaping

and enacting public policy. Terminology used to describe the third sector includes, but is not limited to: voluntary sector, philanthropic sector, nonprofit sector, public benefit organization, social economy, and nongovernmental organization. Researchers note that a lack of general agreement is not coincidental, but rather language is employed to reflect a particular frame of reference (McCully, 2008; Muukkonen, 2009). For instance, "third sector" is a deliberate effort to elevate the nonprofit sector on equal footing to its private and government counterparts. Likewise, "voluntary sector" is an attempt to note the distinguishing features of what motivates or drives individuals to volunteer time and services to the nonprofit sector.

Still, an even broader term to describe the nonprofit sector is civil society, which can be traced to Aristotle's use of community in his essay "Politics" (Davis, 1996). Today, civil society is regarded as all organizations outside of public (governmental) and private purview. In many respects it is the blending together of political, personal, and public interests, which may manifest in the nonprofit sector (Bellah, 2007).

Nonprofits as a means to address social inequalities. If communities lack financial and human resources to address social problems, it would seem that informal educational opportunities would be at an impasse. However, the nonprofit sector provides structural mechanisms to address social need. Community structures, which are often nonprofits, provide agency and opportunity structures for individuals to receive services and raise expectancies that otherwise may be unachievable (Moxley, in press). In this vein, community-structures seek to provide collective efficacy by facilitating a group's sense of accomplishing a task or goal (Bandura, 2000). This research considers community-focused nonprofit organizations (NPOs) as social

structures for diverse members and policy actors to define and address social and educational problems, thereby providing collective community agency.

The success and failure of community-focused NPOs provides an early litmus test to determine if a fledgling program or service meets (or does not meet) needs of the broader community. While public and private sources of education provide market guidance (schools and tutoring services, respectively, as examples), successful and democratic implementation in the nonprofit sector is more difficult to ascertain. Does the intervention meet a community-recognized need or is it a need prescribed by stakeholders? To what extent, if any, were community members engaged in the process? In essence, these questions seek to understand if the initiative was inclusive and democratic.

Due to their community mobilizing features, it is difficult to determine whether alternative forms of education will resonate within communities and become sustainable. History has taught us that community-focused nonprofit educational agencies such as Hospice Care can innovate and fill community gaps such as respite care for the elderly. Over time, they may resonate with larger problems, diffuse into other communities, grow into significant social movements, and ultimately affect public policy (see: Dyeson, 2005 for Hospice Care, as an example).

Little, however, is known about the early stages of these community-focused movements, including how diverse community and policy actors came to coalesce around them. In the rare cases when any research is available, it is likely post-hoc in the form of a historical case study, documentary analysis, or oral history (see Stewart, 2013 as a compelling example of America's first black high school). This case, as it focuses

on early stages of inception, implementation, and refinement, can provide insight into political action that may be theoretically generalizable (Bryman, 2012) to other settings.

The scope of the nonprofit sector. Since the 1960s, reliance on the nonprofit sector has steadily risen. The War on Poverty led to the broadening of social services, as well as the public safety net. Since 2000, the nonprofit sector has outpaced private industry in jobs growth. During that time, the nonprofit sector has added jobs at an annual rate of 2.1% as compared to a 0.6% gain in private industry (Newhouse, 2012). And, while the recession of 2007 to 2009 impacted the sector, it proved to be more resilient than the private sector, as it added 1.9% of jobs per year as compared to the private sector's decrease of 3.7% (Newhouse, 2012).

Music education In PK-12 education: A brief history. Music, along with other forms of the arts, is often regarded as the universal expression of the human spirit. It occupies the complex space of political and cultural contestation (Vaugeois, 2007). Understanding the historical antecedents of arts and music education is important, as it helps locate present-day perceptions of its role in PK-12 curriculum.

Historically, music education played a prominent role in colonial and early American history. Interestingly, institutionalized music education originated in the church singing schools of the late eighteenth century, as a high percentage of individuals were illiterate and church hymns served the purpose of spreading religious messages (Detels, 1999). In the late 1700s (around the time of U.S. Independence), a distinctly American form of musical practices had emerged, the core of which was a focus on experiential learning and performance-orientation, rather than an academic focus on music history and theory, which still dominated Western Europe (Detels,

1999). Lowell Mason and George Webb were central figures in early music education. In 1834, they led a series of conventions on methods of teaching music, which reflected the early American traditions of rehearsal and performance.

Music education was first incorporated in public education in the 1830s due to the perception of its ability to inculcate morality and diligence (Mark, 2008). This is likely an extension of its affiliation with religious ceremony. Incorporation into schools continued to grow in the mid nineteenth century, as it was advocated through the local support (Detels, 1999). Post-civil war music education was dominated by vocal music, which can be attributed to the war including decreased finances and availability of instruments (Noblit, Corbett, Wilson, and McKinney, 2009). The child progress movement of the early 1900s, served to cement music education as a normative curricular subject in public schools.

Music education embodies one of progressive education's central tenets: education through experience. Progressivists John Dewey (1938) and Alfred North Whitehead (1967) argued that experience was a necessary element for learning to occur. Arts and aesthetic education center upon experience are considered to increase student engagement (Shernoff, Csikszentmihalyi, Schnieder, & Shernoff, 2003) and interpersonal growth (Greene, 1995). At its root, music education is not concerned with developing career musicians, but is rather for students to develop self-confidence, appreciate music, and expand their minds (Vaugeois, 2007). In addition, exposure to music may help promote critical thinking (Reahm, 1986).

The effects of industrialization are widely noted as influencing the trajectory of music education in schools. In the twentieth century, music educators became less

concerned with practical skills, instead focusing more on formal approaches to understanding music (Wakefield, 1989). In turn, musical performance became somewhat neglected. This can be attributed at least in part to the Taylorism Movement or "factory schooling." Large music ensembles such as chorus, orchestra, and band came to be popular with administrators for two reasons. First, they were economical, needing only one instructor. Second, they served the additional purpose of positively promoting the school as a desirable social institution (Mark, 2008). Gradually, group ensembles bled into the curriculum of secondary education.

While the manifest intention of the NCLB Act of 2002 was increased accountability, it created many latent consequences, one of which was the de-emphasis of non-assessed curricular areas. In order to meet these newfound accountability demands, instructional time was carved out of other curricular areas, which by extension made them more expendable. Chief among this list are the arts (creative, performance, visual, and music) and physical education. Make no mistake about it, this shift was dramatic in creating an environment in which the arts were forced to seek alternative forms of funding such a parent associations and the support of boosters (Ashford, 2004). The research extends notions of de-emphasis by considering the rapid diffusion of El Sistema programs as evidence of increased nonprofit involvement in music education.

Instrumentality of the Case. While I provide a rationale on case study as a research design in my chapter on methodology, here I situate the case and orient the reader to its instrumentality. Case study researcher Bob Stake (1995) notes there are three forms of case study research. The first is the intrinsic case, in which the researcher seeks to

understand the case for its own peculiarity. It is often exploratory in nature and the focus is uniqueness, as opposed to applying or building theory. The second form is collective. As the name indicates, it entails a group of cases that share commonalities, which may vary widely. An example of this would be a collective case study of multiple El Sistema programs. This brings us to Stake's third type of case, which is instrumental. In it, the researcher seeks to understand the case as a form of a broader phenomenon of interest.

This case is instrumental because I seek to understand and frame the case within the broader phenomenon of community structures redressing the lack of music education in PK-12 schools. In situating the study, I note existing research on El Sistema. To this point, there are over 120 El Sistemas in existence. Due, in part, to its rapid growth there is growing literature on El Sistema, yet, no one has examined it as an alternative form of education with potential policy implications. This case, then, may be an instrument to understand the processes by which stakeholders develop community-focused educational forms. It stands to reason there are many other alternative forms of education addressing this problem through innovative solutions. Thus, this case is one of many such examples of communities mobilizing around the de-emphasis of music education, and a detailed understanding of it may help to guide other efforts.

PECTS: Unifying The Significance of the Study

I examine El Sistema Oklahoma (ESO) as a manifestation of stakeholders developing an educational program, and the subsequent factors of community mobilization around music education. In this brief sub-section, I relate Van Til's (2000) conceptual model of PECTS (politics, the economy, culture, and the third sector) to this

research. In effect, it provides rationale to the transdiscplinary approach of this case research. Given its robust view, it unifies between seemingly disparate fields of inquiry, thereby justifying the transdisciplinary approach to this research.

Van Til's acronym of PECTS politics, economy, culture, and third sector) serves as an important function because, in its proper manifestation, nonprofit initiatives should address all four principles: politics, economy, culture, and third sector. Indeed, best practice research on community engagement enumerates the importance of politics and community norms in developing and implementing social programs (Nelson & Prilleltensky, 2005).

Van Til notes the third space has "the potential to be a source for the reconstruction for a troubled society in an age of rapid change and turbulence" (Van Til, p. xvi). This relates to this research, as sociopolitical environment. While this research is framed within the broader sociopolitical issue of music education de-emphasis, I draw attention to the local community, including stakeholder actions and subsequent political mobilization over a three-year period. For Van Til, economy is broadly construed and may take many forms. In terms of this case, it includes financial, social, cultural, and human capital exertion.

The third component of Van Til's acronym, culture, takes dual forms in this research. First, in chapter four, I unpack the context of the case, which includes the culture of the local community, which includes a strong orientation to faith-based interventions. Second, in analyses I detail the culture of ESO, which desires to transform the lives of children through music.

Because ESO was bourn out of OCU and St. Luke's United Methodist, it contributes to Van Til's view of the third sector, which is last component of his acronym. As I detail in chapters four and seven, it was not until the end of year two that ESO filed for and received its own 501(c)(3) nonprofit status. As such, it retained the core values of these two incubating institutions, including commitments to improving the community and a faith-based mission.

In summation, this study contributes to current views of community-focused nonprofit efforts through a transdisciplinary approach. In doing so, the case serves to describe the significance of political mobilization, capital exertion, and how social need is addressed in the bounded system of the local community through the creation and evolution of alternative forms of educational structures. In the next chapter, I expound upon literature relevant to

Chapter 2: Theoretical Lenses

In this chapter, I review and organize relevant literature around the two theoretical lenses that guide this empirical inquiry. Theoretical lenses are helpful in that they provide the researcher a unified, research-driven perspective to view a phenomenon. Much like a double-edged sword, however they also introduce the risk of limiting one's perception (Cresswell, 2012). In this study, I employ two theoretical lenses to understand the case. Though a bit uncommon, this strategy can allow for a richer appreciation of the case when warranted (Bryman, 2012). I have chosen two lenses because they provide me the necessary perspective to answer each research question individually. Research question three, (the policy implications of the case), relates to the interpretation of the case. In responding to it, I reserve the final chapter of this inquiry to discuss what we can learn from this case.

The literature review plays a pivotal role in the formation of qualitative inquiry. Yin (2009) notes that too many researchers do a disservice to their audience by not properly situating their study within the broader domain(s) of study. As this research is transdisciplinary, I strive to achieve these four tasks across the three domains that constitute this inquiry: educational theory, nonprofit studies, and music education. Within this chapter I seek to assess the landscape of these three domains, thereby providing an entry point for this research. In each domain, I provide an overview of the literature and discuss how each is interrelated and informs the research. In doing so, I draw attention to the gaps in the current state of the literature. The goal here is not to diminish what research has come before, but to set the stage as to how this transdisciplinary case study adds to or complicates existing research. In the conclusion

of this chapter, I provide a summative account of the literature in relation to this research.

Regarding the purpose of the literature review, I adopt Marshall and Rossman's (2006) contention that it should seek to embed research questions within existing research, identify gaps, and demonstrate underlying assumptions behind the questions. One principal assumption that guides this inquiry is a broad of view of education. Fine arts and orchestral music, in particular, place value on the roles of experience, context, and embeddedness of one's culture. In the first section of this review of the literature, I draw upon the theoretical views of three philosophers of education who share such a broad view: John Dewey (1859-1952), Jerome Bruner (1915-2016), and Jane Roland Martin (born 1929). I begin the literature review by examining existing research on El Sistema as a global phenomenon.

Existing research on El Sistema

In wake of the prevalence of El Sistema affiliates, researchers have begun to address numerous elements of the movement. In just the past two years, several dissertations and theses have emerged on El Sistema. These range from examining its efforts in music pedagogy (Watson, 2013; Shoemaker, 2012) to exploring it as a social change program (Fesler, 2013). In his master's thesis, Lui (2012) examines the Leading Note Foundation, an El Sistema program in Ottawa, Ontario, from a sociocultural perspective. El Sistema has also begun to populate academic outlets including peer-reviewed journal and scholarly books. *Music Educators Journal* has published an overview of El Sistema (Lesniak, 2013), as well as an assessment of El Sistema as a vehicle to promote critical awareness and social action. Most recently, Baker (2014)

presents a critical view of El Sistema. In totality, this burgeoning of research suggests that more research on El Sistema is to come.

In her dissertation on music arts, music educator Ann Shoemaker (2012) examines the pedagogy of the Baltimore Symphony Orchestra's OrchKids, an El Sistema-based program that partnered with Baltimore City Public Schools, compared to Venezuelan programs. Her research included direct observation of OrchKids, as well as El Sistema programs in Venezuela. And, while it was outside the scope of her research, she does provide some helpful information regarding OrchKids partnership with the school district. Namely, the program elected to partner with the district for the following reasons: facilities, parental trust of the school district, and guidance on food and nutrition guidelines for afterschool meals. Her findings validate the uniqueness of each El Sistema and its strength in leveraging community assets. Shoemaker notes, "The differences in teaching practices between the nucleos tend not to be due to different ideologies, but to the resources that each director has available" (p. 34).

When conducting observations in Venezuela, Shoemaker draws out the many inconsistencies of government funding in a country with a communist history. As arts funding is becoming increasingly depleted in the U.S., she notes how many of her music education peers are astonished that El Sistema is funded by the Venezuelan government. El Sistema in Venezuela is not without problems, given its history of communist rule including corruption, empty promises, and instruments in disrepair (Baker, 2014). Likewise, Shoemaker notes consistent problems in access to quality instruments and repairs. In addition, necessities (like reeds) are sparse and they may sometimes interrupt practice. This is problematic and can have damning effects, as

many Venezuelan programs practice six days a week at a minimum of four hours per day.

While there are many differences between El Sistema Venezuela and USA, the most dramatic one may be the potential capacity of the American nonprofit sector to legally channel resources to address need, thereby averting widespread corruption. The title of Baker's (2014) critique of El Sistema says it all: "El Sistema: Orchestrating Venezuela's Youth." He views El Sistema, as practiced in Venezuela, as an organized form of propaganda masked in a governmental ploy to embellish Venezuelan democracy. He notes several instances of corruption, including that Venezuelan El Sistema Nucleo Directors often are responsible for raising funds to supplement their nucleos. El Sistema Venezuela's 2006 operating budget was 61.2 million. Government accounted for 91% of funding, while 5% were private donations, and 4% were from unspecified external sources (Shoemaker, 2012). Government funding is channeled through its Ministry of Social Welfare and Participation, which is testament to the country's view of El Sistema as a social program. While it is beyond the scope of this research to examine the merits of El Sistema as practiced in Venezuela, it is important to understand its somewhat controversial history. That being said, this research focuses on El Sistema as practiced in the United States, which is an altogether different issue.

Broad View of Education

Culture plays a pivotal role in shaping individuals' hopes and expectations. Jerome Bruner (1996) maintains that the mind, and thus education, can only reach full potentiality through participation in culture. Over the past few decades, psychologists and philosophers of education have begun to coalesce around the interdependence of

education and culture (Bruner, 1996; Martin, 2007). In this view, individuals create knowledge and meaning from experiences. Research indicates that nonprofit organizations will likely play increasing roles in education, as programs and services continue to become decentralized (Hum, 2010). Because of their informal structure, nonprofits are in a unique position to discover the needs of communities in ways that other formalized structures are not. His strong orientation towards the importance of culture dovetails well with Van Til's conception of PECTS.

The practice of education in community settings. Martin (2011) contends that education has become too narrowly defined in our society and, as a result, we devalue its many forms. Industrialization and Taylorism's Efficiency Movement have contributed to this, as formal education has come to look a certain way and occur within select institutions. Over the past few decades, however, educators have advocated for a broad view of education that take into account culture (Bruner, 1996; Martin, 2007) and the community (Sobel, 2004). To this point, Martin (2011) has questioned the role of community structures in defining and providing educational services. In this vein of thought, alternative structures are also educational and represent the values of the communities in which they operate.

For Martin, education and culture are inextricably linked. She comes to define education as "an encounter in which the capacities of an individual and the stock of a culture become yoked together by some educational agent" (Martin, 2002, p. 64). Further, she conceptualizes multiple educational agencies (MEAs) as those that work in concert to transmit culture. In emphasizing the importance of encounter and culture, Martin contends that the list of MEAs becomes essentially endless. At any given time,

there are a host of educational agencies working in concert to provide multiple streams of education. Learners' educational experiences, then, can vary widely depending upon exposure to and affinity for MEAs.

In this research, I extend Martin's notions of MEAs by examining El Sistema Oklahoma (ESO) as a community-focused educational structure that is the philanthropic product of a diverse stakeholder group seeking to establish an alternative form of orchestral music education. Martin envisions physical spaces for deliberation, which is similar to Van Til's view of the third sector as a shared space for deliberation and knowledge creation.

Martin's view on the significance of communal education has continued to evolve over time. She has repeatedly questioned the role of culture in education. For her, wisely, culture can be both positive and negative. She conceptualizes cultural wealth as the dividend of a culture's stock and limitations (Martin, 2002). The evolution of her body of work is evidence that alternative structures, particularly nonprofit structures, are being under-theorized in the educational literature. She has conceived of multiple educational agents acting in concert to socialize and educate persons across the entire course of life. She laments the current societal view of education as only occurring in formal educational environments such as PK12 and higher and vocational education. This research adopts her view by appreciating alternative forms of education and determining what factors influence their conception.

The notion of community arises from reciprocal interactions, which contribute to democratic exchanges of information and increased inclusivity (DeFillipis & Saegert, 2008). As urban areas have increased heterogeneity, relations among people of different

ethnicities and backgrounds are important features in jointly defining the communal experience. I examine community structures as alternative educational organizations. Germane to this view is the fact that participation in community structures is non-compulsory, which is to say that stakeholders, parents, and participants can choose forms of education that suit their interests.

For John Dewey (1938), it was the experience of education that offered educational value. According to Dewey, learning was a series of unique experiences that, though immeasurable and qualitative in nature, inform future learning. Experience, then, must be valued and education should serve to create meaningful experiences. Consistent with the views of Martin and Bruner, Dewey contended the location of education was irrelevant. Regarding the arts, he paid attention their aesthetic qualities, noting the significance of both the artist and the audience (Dewey, 2005). Thus, through experience the individual constructs meaning through association with prior experiences. Learning, for Dewey, is drawing meaning from experiences. One can assume that today Dewey would advocate for a child to engage in a plethora of experiences including creative writing, music, academic enrichment, sports, STEM programs, robotics, and orchestral music, to name a few.

The Ecological-Political Metaphor (EPM)

Research question one seeks to understand how well the ecological-political metaphor explains the existence of actors coalescing around the idea of orchestral education. In this section, I discuss alternative theoretical views of community actors mobilizing to address social ideas and discuss how they are insufficient. I then draw upon Norton Long's (1958) conception of the ecological-political metaphor, as well as

its applications in current research contexts that include educational policy studies and nonprofit-focused research. I then provide rationale to utilize it as lens to understand disparate community actors participating in the creation and evolution of ESO. I relate relevant educational and nonprofit literature that have contributed to my understanding of the case. In doing so, I show how this existing literature may be better understood with the unifying perspective of the local community as an ecology.

This research applies an ecological-political framework to understand how ESO, the object of the case, operates within the broader ecological system of its community. Consistent with the views of social researchers Nelson & Prilleltensky (2010), I treat the existence of diverse policy actors as evidence of a plurality of perspectives that contribute to community-wide investment in the program. Understanding why diverse community stakeholders invest limited capital (human, financial, social, and cultural) towards addressing music education has significant relevance, because nonprofits are becoming increasingly involved in PK-12 policy, especially in high poverty communities that often lack these forms of capital. Moreover, as the arts and in particular music education becomes de-emphasized in PK-12 education, it is likely that nonprofit organizations will serve as mechanisms for the communities to the fill educational and social service gaps.

In 1958, Norton E. Long, a political scientist and sociologist, proposed the ecological-political metaphor as a means by which actors or "players" cooperate to achieve a "win" or success in the bounded system of the local community. For Long, policy is not a simple or unilateral process; instead it is a delicate balance between democratic processes and the broader functional system in which it operates. As the

name implies, his metaphor contains two parts. The ecological portion is an effort to convey the interdependence of environment, actors, and resources of broader social systems. For Long, actors need not consider themselves political, but participation and/or investment of resources is evidence of political action.

The second portion of the metaphor, the political, is rooted in game theory (Carse, 1986). He considers the complex processes by which individuals choose whether or not to invest in a game or activity. This framework assumes the existence of a choice structure, which is to say that individuals or actors have at least two choices. Actors may abstain from participation or participate in one or more policy or programs. According to Mendel (2003), players become constituents once they take interest in keeping score because they have become invested in the outcome. Similarly, Baum (1999) refers to arenas or fields that serve to keep score. For example, players monitor score and act or exert capital only when there is likelihood their actions will produce desirable results. Conversely, abstaining from action is also a possible action. In relation to this research, I adopt these two views of score keeping by considering stakeholder constituency, exertion of capital, and participation in ESO as partaking in the game of orchestral music education.

The community has been and remains a unique social system in its own right. In his ecological systems theory, Bronfenbrenner (1979) proposed community and neighborhood structures such as school, church, and playgrounds serve as central forces in human development, acting as mesosystems between the micro (family-level) and macro (broader social system). Similarly, Nelson and Prilleltensky (2005) adopt the ecological approach by viewing the community as an ecosystem complete with assets,

limitations, and resources. In their view, community structures and organizations serve as intermediaries by which individuals can create problems to address community needs. While these structures may originate from any of the three broad sectors of society—private business, public (government), and nonprofit—this research focuses on nonprofit community structures.

Relating the EPM to the case. Although it is rarely neat and tidy, one strength of policy is that it is often traceable over time through decisions and actions. For example, if a researcher were to consider a local school's decision to adopt a certain curricular policy, she or he could weigh principles of the community, common values, observe community meetings, examine previous policy decisions, and even social media posts within a given zip code defined to represent the community. A savvy researcher will also appreciate the broader sociopolitical forces that may influence the community's decisions. Indeed, there are many factors to consider, and some lend themselves to empirical forms of evidence.

Policy becomes particularly messy when one seeks to understand it across several perspectives. The EPM is helpful in this regard, as it takes into account political action within the ecological system at hand. In addition, it assumes actors are influenced and motivated by beliefs, interests, and goals that reflect their respective domains. Firestone's (1989) case study of policy formation around Arizona's Career Ladder, an attempt to democratize PK-12 teacher salary, is an effective illustration of politics and political action. He applies the EPM and comes to consider the formation of this policy as a set of overlapping, interrelated games played by the same network of actors who keep score.

When attempting to illustrate his conception of the EPM, Long (1958) used the analogy of a dynamic, vibrant ecological system. He reasoned that, just as a host of living things are interrelated and influence each other's actions to varying degrees in a bounded system, such as a protected wildlife reserve, so too do persons, institutions, and events in a local community. Within this bounded system there are a host of games occurring, he reasoned.

Carse (1986) refers to these forms of games as finite, which means they played in order to be won. Players assume roles and employ tactics and strategies to achieve goals. The beauty of the metaphor lies is that it accounts for layers of complexity that emerge in the bounded system such as a community. Long illustrates this interrelation by discussing how players (bankers, politicians, and newspaper man) in a game of political election make use of each other to achieve their own unique interests, which are all governed by the same functional system. Key tenets of Long's views are represented in Table 2.

Phase Number	Evidence
1	Choice Structure
2	Game Defined
3	Rules Established
4	Re-defining of Game
5	Endorsement of Actors

Table 2: Phases of Ecological-Political Metaphor

Like any game, there must be agreed-upon rules and an audience or spectators. Rules give structure to the game, which are mutually agreed upon and all players must abide by, otherwise they face ostracism. Yet, as both the community and social problems are dynamic, rules are not static and may change over time. The fourth and final key element of his metaphor is the endorsement of actors, which is akin to

spectators or policy actors watching the game. Individuals watch the game and may even be keeping their own score. Ultimately, they hold power in either endorsing or opposing players. In addition, they also may altogether abstain, so the concept of choice structure comes full circle, hence Long's subtitle: the local community as overlapping games.

Advances in technology, grants, and assessment have made local ecology of games infinitely more complex than in Long's day, but the metaphor and principles that underlie it still hold true. Today, there are a host of buzzwords that reflect his conception of games including resource sharing, partnerships, collaborations, and coalitions. Actors and institutions still agree upon a game, which is reflected by a mutually agreed upon goal, such as a mission or vision statement. Just like the game of political election, in order for the game to be of interest to players it must allow for goal variance, which is to say stakeholders seek to achieve goals unique to them. In fact, the widespread existence of memorandums of understanding (MoU) stand as forms of evidence.

Over the past decade, the body of research on the ecological-political metaphor has slowly gained acceptance in various areas of research including educational policy and nonprofit studies to examine how actors come to represent a plurality of views through cooperative means. Mendel (2003) applied the ecological-political metaphor to the nonprofit sector by examining strategic planning. According to Sterling (2001), viewing schools within the larger environment of the community is central to educational policy sustainability.

Though the ecological-political framework is present independently in both of these areas of scholarship, it has yet to be linked between the two. It has also yet to be applied to music education. In this research, I take a transdisciplinary approach in linking it across all three. I contend this course of agreed-upon action (or game, using Long's metaphor) did not simply occur; rather, its rules were molded and shaped by a myriad of choices including persons, events, and social structures. Much like the problem of alternative forms of education is too broad of an inquiry, this problem too is best understood by narrowing the focus of this research. In the following sections, I review existing literature noting how it does not sufficiently account for activity across stakeholder groups. In the following sections I consider 1) lack of resources affecting community mobilization, 2) community directed efforts towards redressing the lack fine arts in PK-12 schools, and 3) the importance of the current climate of collaboration influencing nonprofits.

Lack of financial capital and political organization. For historically oppressed communities, lack of capital is an important element of addressing and politically organizing around social problems. Capital can take many forms including human (knowledge), financial, cultural, and social, the latter being the strength and value of an individual's networks within a given sociological context (Lin, 2002). When discussing cultural capital, Pierre Bourdieu (1986) provides the helpful metaphor of assets (strengths) and liabilities (limitations). Jane Roland Martin (2002) echoes the importance of culture by maintaining that the totality of a culture's assets and liabilities equal its cultural wealth. She weighs the role of one's identity and educational

touchstones across the life course (Martin, 2007). This is consistent with views of nonprofits as pathways particularly for disenfranchised individuals (Schneider, 2000).

Unfortunately, policy change may focus too much on the capital of the majoritarian class, leaving minority students and communities disaffected. Tara Yosso (2005) proposes a bilateral view by recognizing that capital cuts both ways, even though capital of the majority group is often favored. Thus, capital for minority and underrepresented groups most often goes unrecognized or unacknowledged. She contends this "deficit thinking" also affects educational issues as minority groups may internalize deficits and become disengaged in the policy process. Instead, she argues, policy should be built upon the assets of historically disenfranchised communities. In her view, cultural community wealth encompasses six types of capital: aspirational, familial, social, linguistic, resistant, and navigational. She reasons programs and curriculum should be inclusive of these six types of capital. Nonprofit organizations (NPOs) allow for citizens of the community to organize and address social problems at the local level, thereby potentially favoring Yosso's view of capital as multidimensional.

Smith and Lipsky (2001) maintain there are three main categories of agencies. The first is the traditional social service agency, which could be classified as grassroots nonprofits. Through the 1950s, community and educational structures were frequently organized as grassroots from the bottom up and became nonprofits at some point of institutionalization (Mendel, 2003). These efforts invited discourse and political participation in development, however they lacked scalability. This changed, however, with Lyndon B. Johnson's War on Poverty and The Civil Rights Movement's roles in

broadening of the public safety net. This view is reminiscent of Dewey's (1927) view of the community as a democratic means to address social problems through democratic discourse.

A principal result of the Civil Rights Movement and its ensuing policy changes were federal grants targeting inequalities in housing, social services, food aid, education and job training, and other services, thereby dramatically altering the number of nonprofit organizations and leading to professionalization of the sector. For example, national organizations such as the NAACP, Urban League, and YWCA became more efficient means to garner federal grants. Many of these organizations sought to place value on the local by creating affiliate organizations.

The third, and most recent form, is nonprofits created in response to unmet neighborhood or community needs. Smith and Lipsky caution that the real world is not as neat and tidy when it comes to categorization. The view of organizations (both philanthropists and nonprofits) within the nonprofit sector as "social experimenters" of society (Behrens & Kelley, 2008) proves helpful here, because it highlights their role in focusing on amelioration and improving quality of life through addressing social problems. In such scenarios, educational agents, which occur within nonprofits become philanthropic products, may lead to institutionalization and dramatically alter the scope of education as a social service. While these are worthy efforts, they often fail to address which group's social need is, in fact, being met. Is it funders (perceived), those receiving services (expressed), society at-large (normative), communities that lack resources (relative) or some combination of the three? Research question two of this inquiry seeks to problematize whose need is being met, thereby contributing to the

nonprofit efforts to better assess whether programs truly reflect the expressed needs of the local community.

The climate and nature of collaboration. In this sub-section, I consider sociopolitical forces that are contributing to increased collaboration among community agencies. First, I define cooperation according to Paul Light. Next, I discuss collaboration across actors represented in this case. In an effort to provide context, I provide two examples of community mobilization of non-profit involvement in the arts. Then, I briefly contrast how these two efforts differ from the object represented in this case, El Sistema Oklahoma.

Due to increased focuses on evaluation and resource sharing, the term "partnership" has become more nuanced when describing inter-organizational activities. Through a multi-site case approach, Light (1998) developed a three-pronged typology to evaluate the degree of partnering occurring between two organizations involved in innovative practices. He views partnering as a necessary condition for cooperating. Cooperating, then, occurs can occur at three levels, which he refers to the "three C's:" cooperating (most), coordinating, and collaborating (least). Thus, cooperating is full blown sharing or resources and mission, while the other two decreasingly involve cooperation.

There is a burgeoning body of literature on the importance of diverse stakeholders becoming engaged in educational initiatives involving actors from the nonprofit sector (Morgan, 2013), especially those who represent anchor institutions (Berkowitz, 2001;). All three institutions represented in this case have been examined as anchor institutions: higher education (Benson, Harkavay, & Puckett, 2007; Friedman,

Perry, & Menendez, 2014), the church (Cantor, Englot, & Higgins, 2013), and the school (Taylor, McGlynn, & Luter, 2013). I consider these institutions as representing three distinct policy domains.

Institutions within these three domains have a history of seeking collaborative action to address educational and social problems. There have been concerted efforts to address the role of the church through social action ministry (Jacobsen 2001, Pierce, 1984). Academics have questioned the role of higher education institutions in the community (Benson, Harkavay, & Puckett, 2007; Bok & Bok, 2009; Moxley, 2013). Schools have developed significant community relationships (Hess, 2005; Patrinos, Osorio, & Guáqueta, 2009). According to the gap-filler perspective, a primary function of nonprofits is to provide innovative solutions to existing social problems. This perspective is especially salient, as Hum (2010) indicates nonprofit organizations will likely play increasing roles in education as programs and services continue to become decentralized through the increased provision of social services.

When addressing meaningful and sustainable educational policy, best practices indicate independent school districts should actively engage a wide array of stakeholders including private businesses, nonprofit organizations such as faith based-organizations (Anderson-Butcher, Stetler & Midle, 2006). Academics representing higher education also make a case that colleges and universities have a social responsibility to engage in educational endeavors with PK12 schools (Benson, Harkavay, & Puckett, 2007; Moxley, 2013). This is relevant, as this case represents actors from all three of these sectors of society (founders representing private business, faith-based, and higher education).

Community-focused efforts in arts education: Two examples. The A+ Schools Network is a research-based, nonprofit-rooted initiative that focuses on changes at the policy level. It originated in North Carolina in 1995 and diffused to other states. Initial funding of one million dollars was provided by the Thomas S. Kenan Institute for the Arts and the Ford Foundation. It was a hybrid movement, as it was funded by the nonprofit sector but it relied heavily on community input. Gerstl-Pepin (2001) notes, "A+ provided a space for citizens to come together to dialogue and strategize about how to reform and improve schools" (p. 9). While most arts reform efforts are packages, the superordinate goal of the A+ program was for schools to adopt six core commitments.

In 1998, an Oklahoma-based private foundation, the Kirkpatrick Foundation, partnered with the University of Oklahoma and Oklahoma State University to create the Da Vinci Institute, a non-profit think tank to identify "the country's most successful education reform models" ("Who We Are," n.d.). Yet a third university became involved when the University of Central Oklahoma offered to provide in-kind resources and serve as a permanent house for what came to be billed as Oklahoma A+ Schools (OK A+). Since then, four more private foundations have been added. Currently, OK A+ Schools offer professional development to educators, provide networking, and seek to provide research-based evidence for the arts. While school sites can become affiliates, it is noteworthy that none of the ESO school sites have done so.

In 2010, The Kennedy Center for the Arts launched the Ensuring Arts for Any Given Child, or Any Given Child (AGC) Initiative. Its mission is to "assist communities in developing and implementing a plan for expanded arts education in their schools, ensuring equity and access for all students in grades K-8" (Morgan, 2013). As of

September 15, 2015, twenty AGC initiatives have been created across the same number of independent school districts. Recognizing that each community is unique, AGC seeks to tailor program details to school district characteristics provided that equity is the central aim of the partnership. Local communities undergo an application process, which requires them to indicate community assets, letters of support, and other requisite factors.

These two initiatives share the commonality of private foundations acting as social experimenters, but they also differ in their strategies to affect change. Namely, the game of El Sistema-inspired programs occurs outside PK-12 school walls. (Both this research on ESO and Shoemaker's (2012) examination of the El Sistema-inspired program OrchKids in Baltimore, MD are evidence on this point.). Both A+ Schools and AGC, on the other hand, operate within schools. According to Light's categorization, they are in a full-blown cooperation. As a result, they must work within the schools' rules and goals. This is a trade off. While they may be more readily accessible and perhaps reach more students, they potentially sacrifice innovation. In effect, A+ Schools and Any Given Child are playing a different game than El-Sistema programs such as ESO.

The game ESO has put forth as a 501(c)(3) organization allows for the key issues presented in this review of the literature including innovative solutions to problems, embracing and building upon the capital of the local community, and the flexibility and nimbleness that loose coupling affords. In chapter four, I analyze this case of community actors playing the game providing an alternative orchestral music education in the community using the ecological-political metaphor. In doing so, I

illuminate the case through key concepts of Long's metaphor including what is the game, who are the players, and what are the rules (including how they formed and shift over time), and I consider what endorsement of policy actors look like.

Understanding Social Need

Research question two considers what type of social need ESO meets. This question implies that some form of need is being met. In this section, I first draw upon the long-standing nonprofit theory of market failure, which leads to the view of nonprofits filling gaps in social services by addressing a socially defined need. I then briefly define innovation and change.

I consider what constitutes the public and how it can politically mobilize. In doing so, I draw upon Dewey's conception of many publics, as well as contemporary educational philosophers Robert Bellah and Kathleen Abowitz, both of whom echo his views. Abowitz contends that resources and capital are central elements of political mobilization. In relation to this case, ESO has defied her views by successfully mobilizing actors around the need of orchestral music education. Thus, we come full circle to research question two, which asks whose need is being met.

In order to sufficiently address this question, I look towards a four-pronged typology of social need, as put forth by Kettner, Moroney, and Martin (2008), whose research was piloted in a community research setting. Similar to the formatting of research question one, I apply this typology by examining the nonprofit sector's increased involvement in PK-12 educational policy formation through two favored strategies: public school foundations and decentralized school environments. These are

important because ESO had early contact with the OKCPS foundation and the district is a school choice district.

Market failure: ESO filling a gap. Since the 1950s, there has been a steady progression in the number of community-focused nonprofit organizations (CBNOs), especially in historically oppressed communities (Mendel, 2003). The Civil Rights movement and subsequent broadening of the public safety net have played significant roles in this advancing this trend. As a broad-level theory, gap filler theory seeks to explain the multitude of ways in which nonprofit organizations exist to fill gaps between the other two sectors of society (government or public, also known as the market) (Weisbrod, 1975). The gap-filler theory "suggests that [private and] nonprofit organizations emerge to fill gaps in a market created by failures of government provision" (LeRoux & Feeney, 2014, p. 90).

Nonprofits act to fill gaps by responding to social need by creating programs and services. According to this view, as music education has increasingly become de-emphasized in public education (Davis, 2008; Harris & Staley, 2011), the nonprofit sector becomes a mechanism for policy actors to develop a wide array of alternative forms of education. Such initiatives may take a host of forms such as in conjunction with public education (Amrein-Beardsley, 2009), independent of public education (Dresszen, Aprill, & Deasy, 1999), or somewhere in between (Morgan, 2013).

Over time, the theory of market failure predicts if a felt need is unmet by the other two sectors of society (private and government) actors in the nonprofit sector act fill this gap by supplying the demand. Historical, educational examples of this phenomenon include, the provision of after-school serves in response to the latchkey

kid phenomenon (Fashola, 2002), as well as Project D.A.R.E. and similar drug and alcohol awareness programs as part of the war on drugs. This research asserts the nonprofit sector is a means for communities to conceptualize and politicize social problems. The creation of ESO, then, can be viewed as a mechanism for community actors to converge upon on a perceived need of transformative music education, thereby filling the niche gap of orchestral music education.

According to the gap-filler perspective, a primary function of nonprofits is to provide innovative solutions to existing social problems. As noted by Borins (2001), the most frequently occurring operational definition of innovation in the research literature is that of Rogers (1995). He maintains that social change may occur either internally or externally. While internal social change may include technological innovation, changes in ideology, and reactions to institutionalized inequality, external social change may occur through diffusion and adoption of concepts from other sectors of society. Without both internal and external innovations a system such as education would become stagnant and cease to serve its purpose. As this dissertation is steeped in the view of mutuality achieved through democracy and collaboration, an assumption of this research is that education occurs broadly throughout society.

Even though communities are social systems, they are not impervious to external influences. In fact they are often subjected to change from both outside and within the communities they serve. External funders such as philanthropists, foundations, intermediary organizations such as the United Way, and the government through federal grants have long targeted the community as a fulcrum in addressing social ills. From the Hull House, Great Society Movement of the 1960s, to Community

Improvement Grants (CIGs) policy makers have viewed the community and structures that represent it as mainstays in understanding and addressing social needs. Social problems from the private sphere of life, such as spousal abuse and child neglect, are often addressed through community structures, thereby raising public awareness and making the issue educational through discourse (Bellah et al, 2007). Sampson & Lauritsen (1994) provide a historical survey of understanding the provision of resources for battered women. This is an excellent example of how social research, public policy, and community practice manifest at the community level.

What constitutes the public? Researchers have long considered how individuals mobilize to collectively address social problems (Dewey, 1927; Bellah et al 2007; Bess, Perkins, Cooper, & Jones, 2011). This is especially important as marginalized and historically oppressed groups face a host of obstacles, including low efficacy (Ali, McWhirter, Chornister, 2005), and lack the social capital (Sanders & Harvey, 2002), cultural capital (Lareau, 1987), and financial capital to politically organize. Community-focused nonprofits can be viewed as political mechanisms that provide pathways for the local community to mobilize, thereby addressing a social need and potentially affecting public policy. They provide agency and opportunity structures for individuals to receive services and raise expectancies that otherwise may be unachievable (Moxley, in press).

In his day, Dewey argued many publics existed, rather than a monolithic public with a singular aim or purpose. As the concepts of plurality and postmodernism have become increasingly popular, so too has this idea of multiple or a plurality of publics. Bellah (2007) refers to this plurality as the public sphere, which is the multiple areas of

social life where individuals meet together to deliberate social problems and take action. Similarly, nonprofits can be viewed as representing publics within the greater arena of civil society. One such example would be the most of nonprofits unified around the issue of environmental protection. Wagner (2000) makes the case that nonprofit organizations do not form a distinct sector, but rather they should be viewed as part of a complex network of social organizations that comprise the public sphere.

Abowitz (1999) applies notions of publics by considering the many publics represented by PK-12 schools. She notes "public" is in some ways a misnomer because there are many publics represented (and not represented). In her view, the business of schooling encompasses the effort to best represent multiple associations and political movements, which are forms of political action all aimed at the goals of socializing and educating our youth (Abowitz, 2013). Many publics exist and through purposeful deliberation and democracy they become mobilized.

In her analysis, there are two central concerns of publics in PK-12 schools. First, a public only become realized once a problem and the people behind it reach a certain threshold. The second, is in order for a public to mobilize, individuals must organize some form of resources and exert capital to affect change. Scanning the environment of PK-12 schools today, one can view many such publics, such as the anti-testing movement, gay alliances, and bullying prevention. This would also include a public that demands more arts integration in schools.

The emergence and development of ESO fits well with Abowitz's model, as it represents stakeholders representing one or more publics who advocate for the importance of orchestral music education. This public met the threshold of action, as

evidenced by its existence and subsequent nonprofit status. Further, stakeholders representing higher education and the faith-based community represent Dewey's notion of overlapping publics. Although each institution has its own aims, stakeholders representing them elected to participate and invest in the game of ESO in order to achieve a goal. In examining Dewey's conception of publics in contemporary terms, DiSalvo (2009) questions, "How does, or might, design contribute to the construction of publics?" (p. 48). This research may contribute to this ongoing discussion of publics by examining the underlying factors contributing to motive and intent of contributing to ESO as an emergent alternative form of education.

Public school foundations. Through democratic processes such as bonds and election of officials, citizens have decided how much funding to allocate to PK-12 schooling. Public school foundations, however, offer an exception to this rule. They are also known as education foundations and are defined as "privately operated, nonprofit organizations established to assist public (and private) schools" (Clay, p. 1). Public school foundations are classified under the National Center for Charitable Statistics (NCCS) code B20 (Elementary & Secondary Schools) that qualify as a source of charitable donations. Interestingly, they are under-theorized in the literature and warrant attention in this research for two reasons. First, they complicate notions of the public. Second, a public school foundation plays a pivotal role in this case, as will be discussed further in analyses.

Clay (1985) traces the pre-history of education foundations to California taxpayers passing Proposition 13 in 1978, which reduced local public funding of schools. In response, a public consisting of citizens concerned with the de-funding of

PK-12 school sought policy change in funding local schools. In 1982, the Ford Foundation hosted a forum in San Francisco to examine the viability of public school foundations. At that time, Lease (1988) estimates there were approximately 100 education foundations in existence in the United States. Soon, however, the concept of educational foundations began to take hold across the United States. Just eighteen months after the Ford Foundation conference, by the fall of 1983, perhaps only 350 such foundations existed. And, as of 2001, there were 4,800 public school foundations (McCormick, 2001)

National politics kindled the environment for rapid diffusion of public school educational foundations. While The National Commission on Excellence in Education's 1983 *A Nation At Risk: The Imperative for Educational Reform* is widely noted as fueling reform efforts, including the emphasis on standardized testing, it also played a critical role in stimulating the adoption of educational foundations, as evidenced in the Oklahoma City Public School Foundation's founding story ("About Us," n.d.). Lease (1988) notes educational foundations became a mechanism for community members and businesses to supplement funds to schools.

Consistent with the philosophy of local control, each school foundation operates independently, which allows for the shaping of a unique mission, tactics to fund education, communication strategy to the community, bylaws, and board members. According to Mauss (1975), they are external innovations meant to disrupt or alter the funding of public education. According to the ecological-political metaphor, they are a game that allow for choice structure, rules (funding and communication) to be set and potentially altered, and individuals and businesses in the local community can endorse

them through funding or other means. The structure of public school foundation does allow for them to incubate programs to affect change within the school district; however, according to Lampkin (2003) only a small percentage do this.

According to Else (2002), an annual examination of school foundations only accounted for .3% of a school district's budget on average. School foundations do not exist in all districts, so this figure is skewed. Still, it is important to understand the significant impact they may have on PK-12 policy and politics. Foundations may also wield considerable political capital by guiding policy discussions, promoting discourse, and funneling resources to schools.

Perhaps school foundations may best be viewed as a means to provide a subtle, formalized mechanism to affect school politics. De Luna (1988) suggests that school foundations may be best used to stress systematic reform by working in policy areas such as governance, finance, educational leadership, and curriculum and assessment. In contrast, McCormick, Bauer, and Ferguson (2001) view them as a means "to augment, supplement, or complement programs and activities currently being provided by the district" (p. 2). While they have not yet lived up to the Maussian possibility of drastically altering school funding, they can serve to galvanize community members around issues central to educational reform (Lampkin, 2003).

In a historical report for the National School Foundation Association, Else (2002) notes the popularity and promise of school foundations in the late 80s through the 90s. Since then, however school foundations have failed to gain financial and policy traction. Why? Though no empirical data exists to explain why this is the case, a possible explanation is the public may view their existence as redundant, since schools

are already financially supported through taxes (or private tuition in the case of private school foundations—which also may organize an education foundation). This, combined with the lack of a consistent vision, may account for stalled efforts in affecting local school policy, politics, and curriculum. Given the nature of this research, I propose this uncertainty as a microcosm of the broader uncertainty of the nonprofit sector's involvement with PK-12 education. Later in this research, I examine the school foundation within the bounded system of the case.

Philanthropic efforts in PK-12 policy and politics. Philanthropists and foundations are influencing educational policy at an increasingly alarming rate, which may also jeopardize democratic processes, albeit in a different manner. School choice and competition legislation was a landmark milestone that provided structure for private and corporate foundations to begin influencing policy efforts around PK12 education. The $500 million Annenberg Challenge (1993-2001) was the first such long-term philanthropic effort aimed to address PK-12 educational inequality. Ultimately, over an eight year period, funding occurred across 35 states affecting 2,400 public schools, 1.5 million students, and 80,000 teachers (Smylie & Wenzel, 2003).

The challenge provides a watershed moment from old to new philanthropic approaches to education. Prior to it, philanthropic and foundation funding in PK-12 schools was nearly nonexistent, whereas in 2002, the first year after the challenge, such funding totaled $1.5 billion dollars (Colvin, 2005). To put this amount in perspective, federal and state funding on education reached a staggering amount of $425 billion that same year (Greene, 2005). Thus, foundation funding only equated to.0035 percent of federal and state funding, which is even less than public school foundation funding.

Again, however, it would be a mistake, to dismiss this funding as trivial. Rather, it serves to foreshadow the tide of funding that would soon follow. Shortly thereafter, software icon Bill Gates's scathing critique of public education at the 2005 National Summit on High Schools increased the perception of failing schools and served as a call to arms to a new generation of philanthropists.

In many respects, the challenge is now infamous for including little assessment, as well as the lack of addressing sustainability and scalability (Hess, 2005). This is not so much a criticism of the Annenberg Challenge itself, but the infancy period of philanthropic efforts to assess impact. Thus, it provided a large-scale pilot case in how philanthropic funding can affect educational policy from both good and bad perspectives. Hess notes two other impacts of Annenberg. First, it likely accelerated the pace at which philanthropists warmed up to PK-12 funding.

The second significant component can be found in the moniker "challenge," as it broached the subject of nonprofit involvement into educational politics and policy. In total, Walter Annenberg's Challenge included 18 locally designed educational projects that included matching funds from over 1,600 businesses, colleges and universities, and other philanthropists totaling $600 million.

Since the Annenberg Challenge, the nonprofit sector is becoming increasingly involved in a host of matters involving public education, which may be categorized into two areas of focus (Hess, 2008). First, these strategies seek to directly affect school curriculum and the training of key stakeholders including administrators, teachers (through national board certification), and even school board members. In practice, many school foundations wittingly (or unwittingly) employ a similar route of funding,

as they seek to improve educational environments and outcomes within individual school sites. Greene (2005) considers these actions akin to pouring buckets into the sea, which is a metaphor intended to highlight that while these strategies impact individual school sites and effect local policy, they are making little progress towards broad policy making.

The second area of focus, however, does focus on policy change. Lenkowsky (2005) notes private and corporate foundations such as the Broad and Walton Family Foundations are increasingly funding school choice initiatives such as vouchers, scholarships, community school movements, and research advocating for the merits of such policies. According to Lenkowsky, while foundations may differ in tactics, it is clear their goals reflect the aims of marketization of education. Reckhow (2012) contends this conclusion is too simplistic. In her collective case study, she found foundations apply keen methods of evaluation and accountability standards in determining how to best influence local school policy and politics around ideas of marketization.

Reckhow (2012) finds centralization and school choice are the two superordinate factors by which national foundations determine funding strategies (Reckhow, 2012). In her research, she finds that if a school district is decentralized (the existence of local school boards) and allows for charter school legislation, philanthropy is most likely to come in the form of establishment of charter maintenance organizations (CMOs). Overall, she finds philanthropic funding is more likely to occur in centralized environments (mayoral control or appointed chancellor, state appointed superintendent), as funders operate on a tacit assumption that centralized leadership

fosters a tenable environment to educational policy reform. As such, the prospects for decentralized school districts to receive external funding are scant.

A key additional finding of Reckhow's research is the suggestion that while educational reform in decentralized environments is slower, it may lead to the more sustainable change, as compared to comparable efforts in centralized environments. Echoing the research of Kathleen Abowitz, she notes instances of this are rare because in decentralized environments the communities within school districts often lack the capital (financial, human, social, and cultural) to create initiatives and unite stakeholders.

This research provides serves as a critical case because the school district represented in this case is decentralized and allows for school choice and school charters. Reckhow found the most likely outcome was the funding of charter maintenance organizations (CMOs). In addition, the establishment of ESO in high poverty portion of the school district stands in contrast to the prevailing view that places that lack the capital of the majority cannot develop programs.

Whose need? Research question two is "What form of social need does ESO meet?" As a non-compulsory form of education recently completing its third year of existence and having grown exponentially during that time period, clearly some form of need is being met. This research question gives nuance to the construct of need by questioning whose need is being met. For example, is it the benefactors' key stakeholders who represent the interest of the institutions they represent, the community, or some combination of these? I respond to this question empirically through qualitative analysis by coding for

need and then analyzing it across stakeholder groups. In doing so, I note if stakeholders' conception of social need changes over time.

This research is guided by the assertion that communities are utilizing nonprofit structures to innovate diverse, alternative forms of education. Further, in response to some form of need communities are developing programs focusing resources towards arts education. This research focuses on one such community effort to implement an after-school orchestral music education by treating it as a case study to understand the broader phenomenon of the de-emphasis of art education. The lingering questions are who is expressing this need, and how can we better understand it.

Need is a nebulous construct that can be operationally defined a host of ways. This research adopts Kettner, Moroney, and Martin's (2008) four-pronged typology of need: expressed, perceived, normative, and relative. Expressed need is aptly named, as it requires service recipients to empirically express need through words or actions. Extended to this case, this could manifest as participation in ESO. Perceived need, on the other hand, is an individual or group's perception that a need exists. In this form, perception could be based upon one's intuition or view of reality, and it does not require an empirical basis. A commonality between expressed and perceived need is that they are premised on the internal establishment of need. In contrast the other two forms of need (normative and relative) are established externally. In terms of this research topic, this could include orchestral music education as an established external criterion by viewing its existence in comparison to other communities or neighborhoods.

Dewey (1927) examined the expression of need by exploring the public's desire to express political action at the community level. He reasoned that individuals may

become too overwhelmed to engage in public matters requisite with citizenship. In this way, nonprofits also act as intermediaries for individuals to express democracy, thereby playing a significant role in defining community need. For Dewey, political action at the community-level was very much grassroots and democratic. As we will come to see in chapter four, the object of this case, ESO, was neither grassroots nor democratic.

Kettner, Moroney, and Martin's (2008) conception of normative need becomes a helpful lens in clearly seeing the gross lack of educational opportunities in low income, as compared to middle class and affluent communities, especially in regards to the arts. Not only are students less exposed to the arts in public schools, but they are less likely to gain such exposure through informal avenues in the surrounding community because of the lack of community resources such as museums.

A limitation of this study is that I do not seek to understand what need, but whose need. The question, "What form of social need is met by ESO?" refers explicitly to the theoretical lens that drives the question. Thus, the scope of this research is to understand which of the four forms of social need is met, or whether it is some combination of these needs.

Linking need to the nonprofit sector. The 1980s can be regarded as the beginning of increased accountability and standardization across the nonprofit sector. In the 1970s and early 1980s the first professional schools focusing on the nonprofit sector as a field of study emerged (Mendel, 2014). This led to increased resources and capacity towards the development of nonprofit research and in turn best practice-based research. Increased professionalization of the nonprofit sector has created a political economy of increased accountability and evidence of impact. For example, funders such as

foundations and intermediary organizations such as the United Way are placing increased emphasis on evaluation (Carman & Fredericks, 2008) and encouraging nonprofits to develop their own evaluation capacity (Behrens & Kelly, 2008). Gradually, nonprofit studies slowly began populating schools of public policy, organizational studies, and social work.

As the third sector has adopted need analysis and other social scientific tools to identify need, it has amplified its ability to advance social problems and amelioration. Needs assessment, a process to quantify need, is now widely employed, as social science methods and data have become more widely employed in the professionalization of the nonprofit sector (Broxton, 2012; Herman & Renz, 1997). Proponents of needs analysis note its ethical aim to provide equity and justice to disenfranchised communities (Kaufman & English, 1979; Gupta, 2011).

Obviously, Dewey's views of need pre-dates social science research designed to understand this concept. Yet, there are few critical views that question whether community interests, or in Dewey's terms, which public interest is being advocated for and whether it matters. Moreover, Cekan (2015) considers the implications if funders prematurely discontinue programs and services. As a primary goal of the third sector is to address public good, the increased sophistication of community-focused amelioration begs the question whether its efforts remain democratic and if not, does it matter.

Synthesizing the Literature

In this section, I seek to reconcile the three areas of scholarship presented in this literature review: educational theory, nonprofit studies, and music education. Then, I arrive at a tentative assertion that provides an explanation of the increased intersection

of these three domains, which is that the increased de-emphasis of arts education especially in impoverished communities could be viewed as an issue of social justice. This view allows me to accomplish two key tasks. First, I provide a synthesis of the state of the research. Second, I close this review of the literature and arrive at a launching point to detail the methodology that guides this inquiry.

In this review of the literature, I consider current theoretical understandings of educational thought, nonprofit studies, as well as considered community-focused efforts in arts education. I organize the literature within the theoretical lenses that guide this inquiry and research questions one and two. Among other things, I note the importance of high impact experiences such as exposure to the arts and how this is problematic, as music education is currently de-emphasized in high poverty schools, and these same communities lack fewer supplemental forms of education compared to middle-class communities, as well as the resources to access them. In my view, a narrow view of education coupled with ongoing sociopolitical climates of arts education de-emphasis and increased collaboration among community partners have contributed to the environment of actors moiling through community-focused organizations such as 501(c)(3) organizations. Thus, research question one seeks to examine how well the ecological-political metaphor explains this case, including the interplay of social forces, connections, and capital.

This research also provides a unique opportunity to examine and problematize whose need the program is actually meeting. I review the longstanding market failure theory of nonprofits and subsequent view of nonprofits filling gaps in services. I then noted how, as the prevailing political economy of the nonprofit sector is evaluation and

assessment, the sector often fails to consider whose need is being addressed. Instead, the general consensus is participation in services and programs is considered evidence of meeting an expressed need. To drill down on the conception of whose need, I briefly addressed conceptions of what constitutes the public, according to Dewey, Bellah, and Abowitz. I also note that problematizing need is an important consideration given the nonprofit sector's swelling involvement with PK-12 policy and politics including public school foundations.

I have purposely left research question three, policy implications of the case, broad, so that I, as a case study researcher, can remain open to nuances and complexities of the case. Policy implications are examined through Larrue, Varone, and Hill's (2007) loose definition of policy, which highlights the importance of public and private actors working in a targeted manner towards a collective problem. In essence, this question takes into account "what can we learn from these actions taken by diverse stakeholders?" In responding to the question, I channel Stake's (1995) contention that one of the most distinctive characteristics of qualitative research is its emphasis on interpretation.

Stake notes how engagement with a case often causes issues to evolve over time. Prior to analyses, it is important that I briefly note the issue that originally compelled me to the case (in the next chapter on methodology, I include a sub-section on research positionality), which is whether lack of music education is a matter of social injustice. Stake also differentiates between etic issues, which are those brought in from the outside by the researcher, and emic issues, which are the issues of the actors in the case.

In the next paragraphs, I foreshadow how social justice provides a common language from both etic (outside) and emic (inside) perspectives.

Social justice is described by Theoharis (2007) as, "actively engaging in reclaiming, appropriating, sustaining, and advancing inherent human rights of equity, equality, and fairness in social, economic, education, and personal dimensions." (p. 162). Given the various benefits linked to music (increased self-esteem, creativity, hard work, team work, etc), access to music education and lack thereof has been considered as social justice issue (Allsup & Shieh, 2012; Gould, Morton, & Rose, 2009). For instance, Griffin (2011) considers the role of music experience as foundational to individual growth. This is consistent with the aforementioned Greene's and Dewey's established views on the experiences derived from the arts.

Poor communities lack both formal and informal educational opportunities, which could be viewed as a matter of social justice. It is widely considered that the funding of public schools perpetuates social inequality among disadvantaged communities (Anyon, 1997; Kozol, 1991). Schools, then, become an easy target or lightning rod for addressing societal inequity. The harsh reality, however, is they are only a microcosm of broader social inequalities, which is also reflected in the lack of viable educational structures that exist in high poverty communities and neighborhoods. Thus, this is an etic issue.

Griffiths (2003) considers whether the gross lack of educational opportunities for students in high poverty communities should be viewed as evidence of social injustice.While non-compulsory forms of education allow for choice structure, there are likely fewer of these in high poverty areas, as compared to middle class and affluent

communities due to the lack of necessary resources. In the next section, I examine how the public organizes to address lack of opportunities, which may serve to propagate continued educational inequality.

El Sistema's founder, José Antonio Abreu states, "El Sistema is not a program or a curriculum; it is an inquiry" ("El Sistema: In the U.S." n.d.). This statement hints at the underlying epistemological truth that El Sistema is about the journey of discovery, which is also rooted in social justice. A core value of El Sistema is music creation, which is the application of instrumental and theoretical knowledge. In analyses, I pick up on this thread by understanding why this is a core value and how it is communicated to students and families of El Sistema Oklahoma. In the next section, Methodology, I discuss the qualitative methods employed to understand the case, treatment of data, and analysis.

Chapter 3: Methodology

I have chosen to address positionality prior to fundamental or more traditional sections of methodology, such as methods and treatment of data. There are two reasons for this. The first is because my understanding of the case was achieved primarily through fieldwork, which included the ethnographic methods of participant and direct observation. The second is that immersion in the came to influence which data collection tools best allowed me to answer the research questions guiding this inquiry. As I come to discuss in this section, as the researcher, I very much became a data collection tool. Thus, it is important to understand how my lived experience contributed to the construction of this case study.

Part I: Researcher Positionality

This research is an emergent, empirical case rooted within the discipline of educational studies, which is sometimes referred to as the normative study of education. In chapter two, I labored to present relative research to the topic of this research (alternative forms of community education).

The researcher's acknowledgement of positionality is an established practice in qualitative research (see example in Angrosino, 1994). By disclosing positionality, the audience can understand the researcher's lived experience in relation to the inquiry. To this point, Creswell (2012) notes the researcher herself or himself is a tool of data collection. Thus, the researcher's lived experience and worldview are important tools in understanding the selection of methods and subsequent interpretation of data (Bryman, 2012).

The extent to which the researcher's worldview actively influences data collection may best be understood through reflexivity. Schwandt (2007) notes that data or facts in qualitative accounts "are essentially not just about something but are also doing something" (p. 260). His view illustrates the widely-held ontological position that qualitative researchers cannot only be value-free, but they should also acknowledge the implications of existing worldviews. Reflexivity, then, can be understood as the critical reflection of one's own biases and dispositions when conducting qualitative research.

According to Creswell (2012), the researcher's willingness to be reflexive leads to enhanced credibility. Understanding reflexivity is a central element towards recognizing that my interpretation of the case may differ from another qualitative

researcher's. Furthermore, assuming I follow established methods, which contribute to a credible and trustworthy account, this research should be qualitatively sound.

In this section, I locate myself or the "I" relative to the case. First, I locate my burgeoning view as an educator, which tacitly influenced the facets of the case I pursued in data collection. Then, I discuss how I became oriented to the case. Next, I discuss my immersion in the object, which occurred during early phases of data collection.

Location of the self. In this section, I detail how early-career training, becoming a parent, and ultimately deciding to become an educator contributed to alternative forms of education as my domain of research. According to Creswell (2012), providing insight into my drives and choices will help orient the reader to my engagement with the case.

I had the fortuitous experience of finding my "dream job" at a young age. Shortly after obtaining my bachelor's degree in psychology, I became trained in the ways of the medical model as a clinical research coordinator conducting psychiatric clinical ratings and assessments. Over the course of my ten years working in mental health, I entertained returning to graduate school and potentially teaching. Ultimately, I did succumb to the desire to return to school, but in an unexpected way.

As my daughter was nearing school age, it dawned on me that education in its many forms plays a central role in our identity development, as well as socializing us. As a parent, I questioned my role in educating her. Should she attend public or private school? How can I play a formative role in her education? The desire to answer these questions, coupled with the prospect of teaching in some capacity, contributed to my decision to pursue graduate work in educational studies. Of particular interest to me

were the social, cultural, and political forces that shape an individual's identity and educational expectancies.

My master's thesis was an autoethnography examining my experiences in developing and implementing a novel, tribal Native American learning community nested within a broader institutional partnership. In that piece of research, I questioned cultural loss, identity, and tribal citizenship. Emboldened by completing my thesis, I pursued my PhD in Educational Studies, seeking to uncover and understand other forms of alternative education. Gradually, I became interested in understanding the nonprofit sector, as it relates to democratic action. This drove me to carve out a domain of research located within three disciplines (see Figure 2):

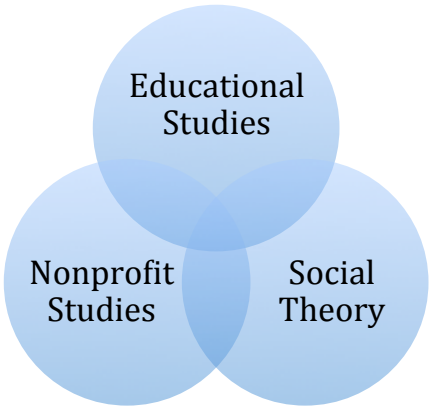

Figure 2: Domain of research

My fledgling worldview as an educator became enhanced by the opportunity to synthesize past work experiences with my first professional teaching position. In 2008, Oklahoma City Community College received a grant award from the U.S. Department of Labor. The $1.72 million grant, titled "Building a Clinical Research Track in the Health Careers Ladder," was a product of President Bush's 2004 Community-based Jobs Training Initiative. After a colleague told me about this grant, I applied and, given

my work experiences and master's degree in Education, was selected to develop the curriculum and teach three online courses in clinical research. Next, I leveraged this experience into a full-time, non-tenure track faculty position teaching psychology at a private, Christian, liberal arts university.

Thankfully, the university afforded me significant autonomy in course development and teaching methods. I took this opportunity to synthesize my views on psychology, educational theory, and nonprofit studies. For example, I integrated service-learning into my courses and developed a special topics course focusing on community psychology, which sought to understand the roles of power and empowerment in marginalized communities.

I was hired in part because the university had recently begun the accreditation process for a four-year teacher education program. To this end, I was tasked with teaching educational psychology, coordinating field placements, and observing candidate teachers in PK-12 schools. Excited yet overwhelmed by these unexpected experiences, I struggled with locating my academic identity. It was at this time that I caught word of El Sistema Oklahoma.

Orientation to the school. The near-freezing January rain pelted my face and I was ill-prepared with neither an umbrella nor a campus map. I was navigating my way around the largest performing arts campus in the state to learn more about El Sistema Oklahoma (ESO), a thriving music education program in the Oklahoma City Public Schools (OKCPS), the state's largest school district.

Just one month earlier, I caught wind of ESO from my dissertation advisor, whose wife worked there as a music teacher. The two of us had been discussing my

dissertation topic and potential community agencies that may serve as a compelling case for my domain of research. After speaking with him, I conducted a quick web search that revealed El Sistema was an international movement with the goal of transforming children lives through orchestral music. ESO was an El Sistema-inspired program that served as a ministry of a local church. From the website, it appeared the program partnered with OKCPS and Oklahoma City University. Compelled by the uniqueness of ESO, I took my then nine-year old daughter, who had played violin for three years, to the Winter Concert. The concert consisted of about 160 kids aged 7-14 playing in two orchestras.

Given the social mission of El Sistema, I knew that many of the participants lived in high-poverty, historically-oppressed communities. The event proved to be an emotional experience. Knowing the impact of high-stakes testing and the subsequent de-emphasis of the arts in public schools, particularly high poverty schools, I was drawn to the significance of ESO. The coolness of the concert was not lost on my daughter either, as she said "I want to do that." Though she plays violin, she had not yet played in an orchestra or large-scale ensemble. Her question brought into focus more salient questions. How did this come about? What does it take to aspire to transform the lives of children through music? What is the backstory? I networked with friends and colleagues in Oklahoma City and was introduced to the executive director through a third party by email. In turn, we emailed and I asked if she would be available to meet to discuss the program. She replied yes.

A large raindrop smacked me on the face, and I was brought back to reality. I glanced at the building name and realized I had arrived at the Wanda L. Bass School of

Music where the office of the executive director, Robyn Hilger, was located. I came to find that ESO, approximately 18 months old, had grown rapidly. It became readily apparent that Robyn, a former public school teacher of the year, was deeply invested in this program. When discussing the factors involved in beginning the program, such as capacity and readiness, she wryly questioned me, "How many opportunities do you get to make transformational change in the lives of so many kids?" Without waiting for a response, she continued her passionate take on the numerous forces contributing to the rapid and unlikely ascent of ESO.

In an effort to drive her point home, she stated, "When forces act, you move." This resonated with me. She was referring to the wide array of groups that had come together to make ESO a reality. They included: a wealthy couple acting as benefactors, two churches, a higher education institution, community volunteers, and the public school system. Her excitement was infectious. I could barely entertain the thought that four or more stakeholder groups are represented (faith-based, higher education institution, community members, and public school system). As if she was reading my mind she stated, "There is something about this program that connects with people and the community." What was that something, I wondered?

Over the next few weeks, Robyn and I exchanged emails concerning my research focus and site access. In the meantime, I stewed over ESO. Was its existence evidence of dissatisfaction with music education in the public schools? As a nonprofit, did it provide a political means for the local community to come together and create an alternative form of formal education? Was it important that so many diverse groups have galvanized around this program? Could this happen across other disciplines such

as the visual arts, dance, or even academic enrichment programs? Unexpectedly, Robyn asked me to come and "see how the sausage is made" by beginning to volunteer at ESO. I was in. For me, this was a rich, complex case steeped with social and educational implications and I jumped on the opportunity to better understand it. This decision would later prove to affect methods employed in this research.

About two weeks later, I arrived at ESO at 3:00 pm on a Tuesday. The large, battered church showed no signs of harboring a burgeoning music program. Given its size, location, and condition, I inferred that Trinity International Baptist once was a vibrant institution in the community. I parked in the rear behind a three story family life building and outdoor, fenced play park. Children ran to the partially rusted, six foot iron fence and welcomed me with smiles and questions. Robyn told me to enter at the west side of the building, so I continued on this path. There were few windows or signs of welcome on this side of the building. I did, however, see a divergent sidewalk path that led to a single metal door, which was flanked by a black 2'x 3' sign labeled "El Sistema Oklahoma."

I came to find the dilapidated but pleasant church, Trinity International Baptist, had a long history of social action ministry. It was selected in large part due to its geographic location, which is square in the middle of the eight school sites that ESO serves. Soon, the site became abuzz with activity. Five days a week, students arrived in waves by school bus or church van from 3:20 to 3:45, depending on traffic. I came to find the school district had altered bus routes and schedules in order to get students to ESO as quickly as possible after school.

The vibrant, great hall exemplified ESO's mission of transformation. Over the course of three and one half hurried hours, students, staff, volunteers, and then parents would set up, breakdown, and reset over a dozen round tables and chairs. During that time the great hall would have served many purposes: student check-in, staff and volunteer check-in, meal service, orchestra practice, which rotates between all the Orchestras Nueva (New), Alegria (Joy), and Esperanza (Hope). And finally at 6:30, it served as an informal space of gathering as parents and guardians picked up their children.

Due to its increasing notoriety and visitations from the community, I learned a select group of students had been chosen to serve as ambassadors to community members and provide tours. Later, I learned this is but one of three recent leader groups designed to give students increased ownership and responsibility. My tour of one was led by two boys around ten years of age. Visibly excited and slightly nervous, they introduced themselves to me. Robyn emerged from managing site operations and proudly told me this would be the very first student-led tour at ESO. I sought to assuage the kids' nerves by telling them they should name the tour "A to Z Tours," as their names begin with the letters A and Z. For a second the joke fell flat, but they slowly grinned, exchanged a look at each other, and laughed. We were off.

The church seemed like a labyrinth of over a dozen classrooms, including a large study hall that spans three floors, but the students had clearly learned the layout. As we walked down a long hall on the second floor, several doors swung open. Evidently, it was time to change classes. Almost instantaneously, I felt like I was swimming among a sea of brass, woodwinds, and stringed instruments, some of which

seemed to steer the little bodies that occupied them. Thus began my journey to understand ESO and the broader policy environment in which it operates.

Becoming Immersed. From the outset, I knew fieldwork would prove to be an important element to understand the complexities of this case. I adopted the concept of sensitizing concepts, which are background ideas that inform the overall study. According to Charmaz, Denzin, and Lincoln (2003) sensitization is the process by which the researcher's senses become attuned to underlying ideas and concepts. In chapter two, I illustrated sensitizing concepts informing my view of the case by organizing them around the theoretical lenses of the ecological-political metaphor (bounded system) and social need. I took preparations to orient myself towards these concepts by developing an IRB-approved observation protocol (Appendix A).

A principal tenet of the ecological-political metaphor (EPM) is investment of stakeholder resources. As an example of the EPM in action, I treated stakeholder time as resource. Thus, I was acclimated to observe how frequently key actors came to the site and/or concert events. As could be expected, my field notes are populated with on-site visits from representatives from the school district. For instance, my field notes detail a community school coordinator from one of the school sites. She brought a student who missed the bus. I treated this as an example of the school site expending resources in bringing the child. Another examples was as a school social worker who came to interview a child, so that "she didn't have to do it over the weekends," as she put it. For me, these two examples highlight the importance of fieldwork as I came to understand what ESO is and how it can be understood through the ecological-political metaphor (EPM).

Further, while not many stakeholders came to the site (due to time-work conflicts), several attended concerts and ensemble performance. There are numerous examples in my field notes of founders, board members, administrators, pastors, and school site teachers coming to witness the transformative power of music. The observation protocol sensitized my views, as I paid particular attention to their sitting arrangements and interactions. In addition, these opportunities proved fruitful, as informal conversation proved to illicit candid and thoughtful insight into their investment in ESO. One such example is when I sat next to an associate pastor at the spring concert. From field notes:

> As the students set up, I take the opportunity to ask him how things are going at Trinity and [make] other small talk. He tells me he just finished his first year as associate pastor at Trinity. I ask him about his thoughts on the first time he heard about ESO. He pauses to think and says that he really didn't understand it the first time Tobin told him about it. He had to go over and see it in action. He continues by telling me that whenever he tells someone else about it now that they don't get it either and he tells them that they just need to come and see it. He tells me that ESO has been a great partnership for both sides (St. Luke's and Trinity). They [Trinity] needed occupants for their large space and income, he explains…. After the second orchestra performs, we wait for the third orchestra to take stage, I ask Kyle what he or what staff at other churches think about social programs such as ESO. Thoughtfully, he responds, "the nonprofit sector has really stepped in because the church as an institution has really abdicated many services, not only for the poor and needy like soup kitchens but also the church used to be a big patron of the arts." He continues, "I think this [ESO] may be the wave of the future. For example, you don't see many churches of different denominations working together, but we've found common ground. This is really a symbiotic relationship that we have.

For comparison, my interview with the head pastor at Trinity corroborates many of the same concepts the associate pastor mentions. However, they lack the detail and candor

of this spontaneous interaction. I witnessed this time and again. When discussing differences between denominations and common ground, Pastor Tobin noted:

> It's different. Methodists and Baptists are different, but there's common ground that we can be on….we attack things differently and that's okay. What I love about it is that we do have that shared common ground between Baptists and Methodists and the people that are working in this that is the beauty of it. I get to talk with a lot of the OCU students and leaders that come over and some professors that come over. My office has been filled with people. Just talking through things.

For Pastor Tobin, ESO serves as a multi-faceted ministry. Given his statement, perhaps its greatest importance is that it brings diverse people into the church.

I did not anticipate being a participant-observer, but that was the way events unfolded. In the weeks following my tour of the site, Robyn and I exchanged pleasantries through email. Gaining site process was not difficult, but it was a process. I exchanged emails with Robyn and provided her and Dr. Raiber [Director of Teacher Support at ESO] a copy of my dissertation proposal. We met for coffee and discussed the topic of my research. They were both interested and saw the relevance of the case in relation to educational policy. In an effort to maintain good relations, I served as a volunteer at ESO a handful of times (though I did not collect data during this time period).

Once I received IRB approval, I began fieldwork in earnest. Robyn encouraged me to continue serve as a volunteer when conducting on-site fieldwork. I knew that volunteering while collecting data might provide unique opportunities for data collection that would otherwise not be available, including more in-depth interactions with site staff. In addition, being a volunteer would allow me to modicum on insider

status. As my primary goal was understanding how the site works, I reasoned would give me deeper insight into the case. I said yes. Ultimately, I came to find that my fieldwork could be delineated into two types: on-site/performances and meetings.

Bryman (2012) summarizes the literature on ethnographic fieldwork by presenting a helpful guide in distinguishing levels of participation, involvement, and roles that emerge when conducting fieldwork. When on-site, I completed a host of tasks including serving food, setting up chairs, hall monitoring, assisting students with homework, and interacting with parents, community members, and other volunteers. Interacting on-site provided me deep insight into how not only ESO functions, but how its representatives interact with representatives from other institutions represented in the case, such as the public school sites or church staff. I came to find that fieldwork, and social research in general, does not always fit into categories and types. For instance, I was not always a participating observer. I switched roles to that of a direct observer at any form of meeting (professional development, board, committee, and leadership)

I was also surprised to find that roles in the field varied by location and context. When on-site or at performances, I experienced high levels of interaction with staff and children. This proved to be worthwhile, as I really understood how the site functioned including underlying values shared by staff. One such example can be drawn during my time of volunteering with pick-up. From field notes:

> Over the next 10-15 minutes mostly all ESO staff had left and we were down to just one girl, xxxxx age 11. She came to hang out at the desk, and as Laura [site coordinator] was breaking it down for the day, R and I sat and visited with her. I made lots of small talk and told her stories about my daughter whom is nearly the same age. She laughed. For more than 10 minutes the three of us visited. It could have become awkward but it didn't. Robyn [executive director] commented on how long her had grown. Dr. Raiber [music director] asked her if she knew about Locks of Love. She didn't. He explained that if cut hair was

> eleven inches of longer that she could donate it. Further, he went into detail about how both of his daughters did that. Robyn asked xxxxx what she thought about that. xxxxx's dad arrived. Interestingly, neither he nor Mike or Robyn felt pressure to cut the discussion short. There were hand motions and further explanations, but the upshot is that everyone waited patiently for xxxxx to express some degree understanding, which she did. I found this interesting because during this whole time with xxxxx there was no discussion of music but a continual focus on her as a person. This speaks towards an ethic of care and social mission.

While this institutional value is corroborated in interviews, the concept is more abstract and leaves the details to the imagination. For example, in an interview with the site coordinator, she expressed: "So I think a lot of the St. Luke's [church's] values. I think about a lot when I'm doing my day to day things like this can be gross but like every single day I make sure that the bathrooms have all the trash picked up." In this quote, Laura communicates the importance of values and how they give her purpose to do the "gross" things. This example demonstrates how interviews lack the depth and detail that is captured through fieldwork.

Through immersion with the case, I came to understand subtle yet important elements of the case that would have been otherwise impossible to note. Fieldwork also afforded me the opportunity to interact with key informants. Some of these interactions were spontaneous. According to Bryman (2012) such instances may be preferable to interviews as they allow for increased naturalism. (Though it is worth noting that I did conduct interviews, as well.)

Gaining Legitimacy. Being on-site weekly over the course of six months created an interesting experience of becoming legitimized. As I reflect on this experience, it occurs to me this was not a singular event, but a process. I was afforded the opportunity to interact with a host of individuals ranging from staff, children, and site guests. I am an

extroverted person, so I am comfortable with introducing myself to others and facilitating discussion. The most frequent question I would receive in response to beginning a conversation was "How did you hear about El Sistema?" At the beginning of discussions I would typically discuss my research.

In Figure 3, I distinguish between overt and covert ethnography. In the former, the researcher it is widely known and the researcher fully discloses that he or she is conducting research. In the latter, the researcher is "under cover" and actors in the setting are unaware of his or her intentions. When on site, I was always forthcoming about my research, yet the fact that I was conducting it was not always known. This changed however at about my two month mark on-site when I accepted an invitation from Robyn to attend a professional development meeting.

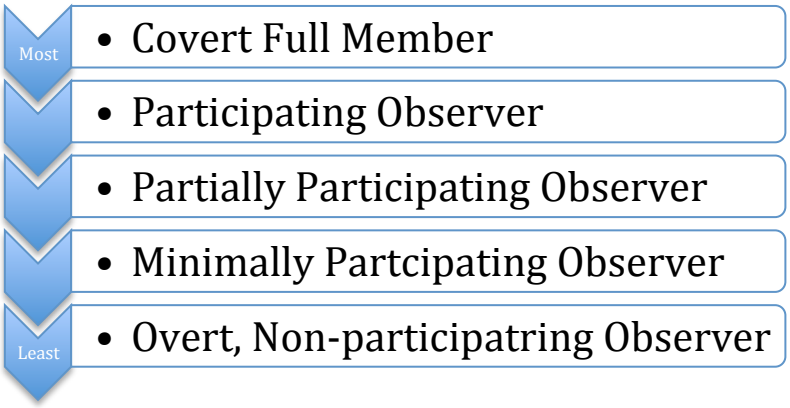

Figure 3: Degrees of Participation and Involvement in Fieldwork

At the meeting, Robyn introduced me and my research to the group. In doing so, she asked teaching faculty to "Be truthful with Brent. Please share the good, the bad, and the ugly." She continued, telling the teachers:

> Brent's research is a positive for ESO, because he will be able to document and understand ESO and its growth. Up to this point, it is a lot of it is collective knowledge. Some of that knowledge pre-dates anyone in this room.

In a sense, I held dual status as both a researcher and a volunteer. This provided me two distinct advantages in the research setting. First, other volunteers viewed me as part on their group and this may have increased their willingness to open up. In effect, through our personal interactions I witnessed solidarity. Though we did not know each other well, we shared a bond by joining ESO in the mission of serving kids. I came to find a common thread that many of the volunteers shared a deep appreciation of music and many played an instrument at some point in their childhood. Given their positive experience, they saw ESO as a means to re-circulate that gift and were happy to be of help in this regard.

Second, volunteering allowed me to demonstrate to gatekeepers my affinity for the mission of transforming the lives of children through music. For instance, prior to interviewing the founders, Robyn invited me to a quarterly board meeting because she wanted to introduce me to the founders. As the meeting began, Robyn outlined my research by stating that I was interested in how ESO formed and its relation to public education. She then prompted me to introduce myself to the group. I thanked the board for the opportunity to conduct research with them, told them I had been on site several times. Feeling the need to share in my passion to music, I told a story of how my fifth grade daughter has played violin for four years but has just begun creating her own music. I recounted a story she had told me just a few days before. Before her orchestra class, she was teaching her peers how to play the "Whip and Nae Nae," which is a pop song. The board nodded in approval.

On any given day, five to twelve on-site volunteers would be on site at ESO. About half of these were regulars who could be characterized as seniors (over 65). The

majority were members of St. Luke's United Methodist who served meals in the kitchen the first half of the program. The other half of volunteers consisted of a rotating group consisting of 30-40 retired teachers, churchgoers, or working professionals who had some personal connection to ESO. Even though I was a researcher, I was largely considered part of this group by staff.

My relationship with Robyn was a bit different, however. I think she viewed me as part, researcher, friend, advocate of ESO, and volunteer. From field notes:

> When discussing all of this, I became aware of the plusses and minuses of being a participant-observer. Robyn and I have talked ESO a lot. This afternoon, she asked me for some suggestions. I couldn't really present myself as value-neutral, so I discussed other "call to action" screenings I have attended, the importance of the audience, and many other nuanced, complicated factors in such and endeavor. We discussed the possibility of a focus group (her words) or search conference (my words) in relation to the 3/30 screening. We left it at that and moved on to the next topic, effortlessly. This is how things have progressed with us. We share our own experiences, talk about the topic at hand, and move on. I am not sure if I am acting as a sounding board or if she is trying to solicit my opinion on matters. There are some things that she does not ask my opinion at all.

In this excerpt, we see the challenges of balancing roles in social research. Later during the exchange referenced above, she asked me how my research was unfolding. I brought her up to speed on where I am at in the process (coding and document analysis, which should lead to refined research questions and I then plan to briefly collect more data). She said she is looking forward to seeing the outcome. We talked about the challenge of stakeholders representing different segments of society—faith-based, higher education, public school, business, etc. Robyn actually brought this up. Her goal in doing so, I think, was to highlight the importance of relations between people.

Given my access and subsequent immersion, I felt a strong sense of responsibility in accurately representing the program, as Robyn put it at professional development, “Good, bad, and the ugly.” Near the conclusion of my research, I asked her why she provided me such far-ranging access. She replied:

> I'm sure I'll have more to say about this when I can really think about it but in a nutshell it was the fact that you came and served with us. You took the time to learn about our program, understand our kids and engaged with us at a very high and super supportive level. That told me you weren't "using us" but were truly interested in our work and kids.

Her response conveys the importance of ethical and responsible community research. It is also consistent with Nelson and Prilletensky’s (2010) assertion that community-focused research is built upon trust, respect, and mutuality.

Over the course of fieldwork, I spent a lot of time on-site with ESO leadership, which may have given teaching faculty and volunteers the illusion that I possessed inside knowledge of the program. For example, one such example came from an informal interview with a Robert [a pseudonym] a staff member. From field notes:

> I asked him what he thinks is good about the program. He said they have good attendance, which is like consistently 90%, so kids must like the program he reasons. Also, they keep growing. He told me that about 90% of them are good kids [laughing]. He said they can’t all be. I told him I was doing research here and he then proceeded to ask me, “What age the oldest kids are in the program?” I told him middle school. He then asked what the plan for the program is. I waited to see if he would elaborate his question. Reluctantly, I was about to answer, then he continued, “Are they going to follow these kids until they get older like high school?” Thankfully, this proved to be a rhetorical question, as he told me “It seems like when they get to be sophomores the bigger ones could teach the younger ones.” He concludes by saying that would be a good thing. It wasn’t until later that I realized I never answered his question.

It is not uncommon for researchers embedded in the field to experience difficulties balancing insider-outsider status. My response

to Robert, as well as my earlier interaction with Robyn, illustrates the difficulties of balancing insider-outsider status. Practicing reflexivity, I also consider to what degree power plays in social research and interactions. Merriam, Johnson-Bailey, Lee, Kee, Ntseane, and Muhamed (2001) notes that power manifests differently across cultures. For example, volunteers or parents would often assume I was a staff member. When I explained that I was conducting research, I noticed positive changes in tone and increased willingness to engage in discussion. I found people wanted to share their experiences with ESO or music education in general. Typically, this resulted in an authentic discussion, as individuals were curious about my research and/or desired to share their thoughts.

Part II: Methodological Approach

In this section, I discuss case study as the overarching methodological approach to this study. I then elaborate on constructivism as the philosophical and epistemological paradigm guiding this inquiry. Lastly, address the methodological limitations of single case study approaches and my rationale to conduct a single site case study.

Case study as a form of research design. As case study has become increasingly accepted as a research design, I detail the literature and take effort to relay a sound

knowledge of the methodological literature. Case study is an overarching research design that provides structure to examine and provide detailed understanding of complexities and nuances of an object, phenomenon, or person. Adopting established designs, such as case study, build upon best research practices, thereby increasing the credibility of the research (Bryman, 2012; Shenton, 2004). Glaser and Strauss (1967) proposed case study research as a viable option in the social sciences when developing grounded theory. Since then, case study has matured into a widely accepted form of social science research.

Today, there are many subforms of case study research ranging from objectivist to subjectivist epistemological positions. In this study, I draw heavily upon the work of three such case study theorists: Michael Yin (2009), Sharan Merriam (1988) and Robert Stake (1995). These researchers orient on a spectrum of positivism towards interpretivism, respectively. Blending aspects of all three theorists is consistent with the constructivist position that guides this inquiry, as it lies in-between their epistemological positions.

In its simplest form, Yin (2009) contends case study as a methodological approach consists of collecting data across two or more domains in an effort to provide contextualization and triangulation of data sources. The selection of ESO as a case meets Yin's (2009) criteria of a critical case. In it he suggests there is sufficient theoretical rationale and clear propositions to warrant whether the theoretical propositions hold true. A single case, when properly and empirically designed, then, can be used to determine whether the propositions hold true or if alternative sets of explanations are more pertinent.

Bryman (2012) refers to this as the analytic generalizability of the case. Thus, case study can make significant contributions to advance theory and practice. Relative to the topic of this research, I analyze the ecology of the local community and how actors contributed to the formation and evolution of ESO. I also examine what form(s) of social need ESO meets in the local community. A thick description of the case combined with usage of established research methods may serve to inform and understand other community-focused efforts towards the arts.

Similar to Bryman, Yin delineates between level one and two inferences. The former relate to the findings of the case study. Second level inferences, on the other hand relate to analytic generalization. The structure of my research questions affords me the opportunity to complete both levels of inferences. First level inferences occur through research questions one (chapters five and six) and two (chapter seven), whereas the analytic generalization of the case occurs primarily through research question three (chapter 8, implications).

Robert Stake's view of case study orients towards interpretivism. Stake distinguishes among intrinsic and instrumental forms of case study. Intrinsic designs seek to understand the case, "not because by studying it we learn about other cases or about some general problem, but because we need to learn about that particular case." (Stake, 1995, p. 3). Whereas an instrumental case study employs design to understand something broader than the case in question. In this view, the researcher is examining a peculiar case because she or he is interested in a broader phenomenon. In this research, I consider ESO within the broader existence of the de-emphasis of music education in PK-12 schools. Moreover, I examine how a community responds to this social need.

Thus, this research design falls squarely as an instrumental case study.

According to Yin (2009), the primary benefit of case study as a research design, is the structure it provides in collecting data across two or more domains in an effort to provide contextualization and triangulation of data sources. In relation to this study, data analysis across the six sources of data were triangulated to respond to research questions one and two. Research question number three, which deals with the policy implications of the case three, however, relies upon data interpretation.

Philosophical approach to the research. Thoughtful foresight towards philosophy and ontology enhances the design of research (Bryman, 2012). Thus, it is important that the researcher aligns her or his research design with the appropriate nature of reality, knowing, and the role of values and politics. To this end, Nelson and Prilleltensky (2010) provide three paradigms to understand community research: post-positivist, constructivist, and transformative (see Table 3). In doing so, they echo the views Lincoln and Guba (1985) who stress the importance of alignment of qualitative inquiry with underlying philosophical paradigms.

Assumptions	Paradigms		
	Post-positivist	Constructivist	Critical
Ontology (the nature of reality)	There is a single, external reality that can be imperfectly of probabilistically understood	There are multiple realities that are constructed by the research stakeholders. There are no universal laws; reality is relative to the constructions of stakeholders.	There is an external reality that has evolved through history and is constituted of social and institutional structures
Epistemology (the nature of knowing)	Realities can be broken down (reduced) into component parts and causal mechanisms can be problematically understood.	The goal of the research is to understand and interpret the multiples realities of these stakeholders.	The research works in solidarity with oppressed groups and strives to amplify their voices through a process of dialogue and consciousness-raising. Transformation of society is paramount.
Ideology (the role of values	Since there is an external reality that is	Since reality is relative and multiply constructed, the	Since there is an external reality that is shaped by

and politics in knowledge)	independent of the research. The researcher should remain value-free.	values of the researchers, the research participants and community members are part and parcel of their constructions. Research is value-bonded.	competing values, the critical researcher is morally obligated to use transformative values to guide research towards social change.
Methodology (research tools to obtain knowledge)	Primarily quantitative and uses reliable and valid measurement scales. Qualitative methods can be used to a lesser extent or as a complement to quantitative methods	Community research is primarily qualitative and uses a variety of different methods, including interviews and obligations…and case studies. Quantitative methods are used to a lesser extent	Community research is primarily participatory and action-oriented in nature. Both methods can be used in the service of social change.

Table 3: Research Paradigms, adapted from (Nelson & Prilleltensky, 2010)

This qualitative research study is consistent with the constructivist paradigm, which is shaded to highlight the four underlying assumptions that gird it. As the researcher, I do not seek to represent one reality. Instead, multiple realities are present through a host of data sources. The goal of this research is not to understand or interpret reality for each stakeholder, but rather to understand the case through theory or build theory, when applicable. This research reflects views of individuals present in the data and myself. Hence, the preceding section on my positionality.

Addressing limitations of case study research. Historically, researchers who advocate for positivist, hypothetico-deductive forms of research denigrate qualitative case study research (Campbell & Stanley, 1966; Dogan, Pelassy, 1990). More recently, however many have come to value it as a means understand complex phenomena or generate hypotheses for future research (Creswell, 2012). Gaining insight into the development and implementation of ESO may provide significant implications to future community-engaged research efforts, especially those focused on the arts.

There are also critics of single case study research. The most common criticisms include lack of sampling methods, its subjectivity, and that sloppy research may simply lead to confirmation of pre-existing beliefs and worldviews of the researcher (Pelassy,

1990). As a counter to this first criticism, Yin (1995) strongly advocates for multi-cases so researchers may compare and contrast between cases. He argues that multiple cases will bolster the credibility of the research. On the other hand, Merriam (1998) and Stake (1995), both of which lean towards a more interpretivisitc orientations of case study, value the depth of understanding that single cases can generate provided the researcher follows existing best practice data collection and uses tools to enhance credibility and trustworthiness.

I have chosen to focus exclusively on one case for two primary reasons. The first is logistic, as at the time of data collection ESO is the only El Sistema affiliate in Oklahoma (an affiliate in Tulsa, Oklahoma has been implemented since this research began). Second and more importantly, I employ extensive fieldwork and ethnographic methods, in order to gain a robust understanding of the case. In doing so, I seek to understand in what way(s) nonprofit organizations can serve as mechanisms to engage and unite stakeholders around educational innovation. Given the local community includes its own sociopolitical environment and politics, this is an appropriate choice.

Part III. Strategic Methods

This section serves as the meat and bones of the methodological section. I discuss methods used for data collection. I then discuss the analytic procedures I employed to make sense of the data. In doing so, I lean upon a pre-established framework by Marshall and Rossman (2006), which is important because the adoption of previously established methods and procedures increases study credibility (Shenton, 2004). I discuss handling of documents, as well as Stake's (1995) strategies of

interpretation and usage of tense. I conclude this section by discussing efforts to increase the trustworthiness of this research study.

Methods (sources of data). Methods are the means by which a researcher seeks to obtain data or evidence. According to Yin (2009), case study design is best understood in six potential forms of empirical data: documents, archival records, interviews, direct observation, participant-observation, and physical artifacts. He states, "multiple sources of evidence essentially provide multiple measures of the same phenomenon" (p.116). Effectively accomplishing this task bolsters the study. He, along with Creswell (2007), notes the strength of case study is its ability to collect and synthesize multiple forms of data. In Table 4: Qualitative Data Sources, I list the six forms of evidence collected in this study.

Category of Data	Evidence Collected
Documentation	Website information Meeting minutes (board) News articles Executive Director Reports ESO parental newsletters
Archival Records	Organizational flowcharts Organizational logic models
Interviews	Individual interviews
Direct Observations	Professional development (staff) meetings Meetings (board, professional

	development, leadership, communication task force)
Participant-Observation	Site visits, Concerts
Physical Artifacts	Handwritten note to student

Table 4: Qualitative Data Sources

During the data collection phase, case study design poses unique risks. The most central of which is collecting too much data and failing to recognize a significant level of saturation (Yin, 2009). In order to thwart this hazard, I developed a data collection master list (see Appendix B). Yin recommends such a tool for researchers to focus and eliminate potential distractions; thereby ensuring data is saturated across key categories. *Handling of Documents.* Hodder (2000) builds on Lincoln and Guba's (1985) distinction between formal and informal documents. He notes both require the researcher to rely on context and interpretation. In making this case, he draws upon the sociological views of material and nonmaterial culture. Clearly, documents stand as evidence and artifacts of material culture. An inherent problem is that they may be interpreted credibly or poorly. Hodder contends researchers must place them in the their proper context when attempting to understand what they intended to convey. To this end, I considered the dimension of time by creating a chronological document database. Culture changes over time, but the document in question was created at a specific moment in time. Assuming that the document is a static representation of the culture would be a mistake.

If we accept that documents represent a slice of the temporal dimension of culture, then what are the methods by which we analyze them? Hodder provides three areas of evaluation that the researcher should undertake simultaneously: identify the context of the document(s), the recognition of similarities and differences in relation to

other documents, artifacts, or other forms of evidence of the culture, and relevance of the data in relation to general or specific theories. For example, he links the notion of culture as temporal by challenging the researcher to compare and contrast artifacts. In doing so, the researcher should ask three evaluation questions: "What changed between these artifacts?" "Why did this happen?" and "How does this relate to theory?" Hodder maintains that adhering to these three standards of evaluation will lead to increased confirmation of the qualitative research at hand, thereby increasing the credibility of the research.

Interviews. When conducting qualitative fieldwork, Creswell (2012) delineates between formal and informal interviews. Formal interviews lend towards a study's trustworthiness, as they are often adhere to an interview schedule. In this study, potential subjects were presented a university-approved IRB consent form (Appendix C). All questions were answered to their satisfaction during the consent process. I conducted sixteen semi-structured interviews. The interview schedule is included as Appendix D.

All interviews were conducted in a confidential, private place convenient for the participant. All participants chose yes for the four opt-in items, which were: "I agree to being quoted directly," "I agree to have my name reported with quoted material," "I agree for the researcher to use my data in future studies," and " I consent to audio recording." All interviews were transcribed and coded using the qualitative software NVIVO.

Sampling. I employed two widely accepted methods: purposeful and snowballing sampling. Purposeful sampling consisted of co-founders, ESO site leadership, as well as

the past and present Fine Arts Directors at OKCPS. I asked each of them who else they knew that would be knowledge of ESO. Two individuals contacted for interviews, Jose Luis Estrada (first Executive Director of ESO) and the OKCPS Director of After School Programs, did not reply.

*Field Research***.** My engagement with the case spanned six months. During that time, I completed 22 field observations. Consistent with the view of Lofland and Lofland (1995), I conducted fieldwork at different times of the day and across many types of environments, in order to gain a better sense of the object of study, ESO (See Table 5). Experiences in the field provided varying degrees of opportunity for collecting notes. When I was acting as a direct observer, I wrote up field notes in real-time either by hand or digitally. However, when acting as a participant-observer, I had limited access to write up my field notes, which poses significant challenges.

Type of Field Experience	Frequency	Type of Observation
Site Visits	11	Participant Observer
Concerts	3	Participant Observer
Formal Meetings (board, site leadership, taskforce committee)	5	Direct Observer
Professional Development	3	Direct Observer

Table 5: Field Experiences by Type

As suggested by Lofland and Lofland, I developed a system of note taking that best suited the situations presented in the field. While in the field, I jotted notes in a pocket-sized notebook, and in some cases scrap paper or even my hand. I consciously sought to make mental notes of events and activities such as were interactions took place, the importance of physical location and body language, who was present at concerts including their demeanor. When time allowed, I would re-visit my jotted notes to fill in details, in order to combat mental decay

At the conclusion of each field experience, I would convert my jottings to full

field notes. I endeavored to complete this task within twenty-four hours and often met this standard. I cannot overstate that writing field notes was an overwhelming task. (Field note compilation, transcription, and coding were much more time demanding than I anticipated). I provide one field note as an example in Appendix E, as evidence of my sensitivity to the social environment. This sample also demonstrates how I integrated analysis into field notes.

Throughout the fieldwork process, I had several informal interviews with informants. These came to be a significant source of data for me. Being on site and at concerts allowed me to richly experience the case. The numerous informal interactions I had allowed me to construct and extract meaning of the case from multiple participants. Lofland and Lofland provide several helpful tools for informal interactions, which I sought to adhere to. Namely, I explained the nature and purpose of my research to the individual. Pseudonyms and potentially identifying information including the context of the interaction were altered to ensure confidentiality.

In many ways, informal interviews stand in sharp contrast to formal interviews. This is not to say that one is better or preferred over the other, but rather it depends on the goals of the research. In this case, I sought to gain a deep understanding of the case. Thus, both formal and informal interviews (occurring through fieldwork) afforded me the best opportunity to truly understand the case, including how it came to be, how it evolved over time, and its significance to the local community. The inclusion of informal interviews may enhance the trustworthiness or internal validity of the study by providing evidence of what the investigator heard, saw, and experienced (Schram, 2003).

Analytic procedures. All sources of data in this study, including transcribed interviews, were analyzed through coding strategies aimed at generating data reduction. Marshall and Rossman (2006) provide a helpful framework for analytic procedures in qualitative research. In this section, I discuss my analytic processes through the seven steps they suggest. They are procedures follow seven steps: 1) organizing the data; 2: immersion in the data; 3) coding the data; 4) generating categories and themes; 5) memoing (offering interpretations through analytic memos); 6) searching for alternative understandings; 7) writing the report.

Organizing the data. I created a study database using Microsoft Excel. This database served as a log of data-gathering activities and developed a process for managing data. For instance, once I completed a field note (Ideally 24 hours within of field visit), I would enter into study database and then upload the completed final to NVIVO for coding. Over time, I found that I could have eliminated this step, as NVIVO can also serve as a database, but I had already begun this process so I finished it.

Immersion in the data and memoing. Immersion allows the researcher "to become infinitely familiar with the data" (Marshall & Rossman, 2006, p. 158). This was accomplished through the writing up of field notes, transcription of interviews, and examination of documents and artifacts. As this case study includes ethnographic methods (participant observation), I was effectively a data collection tool. Thus, memoing became the central process by which I made sense of the data. I captured two types of memos: analytic memos and reflecting memos. The former focuses on analytic tools that bear on the study, processing of peculiarities, and insights gained (Creswell, 2013).

Reflective memos, on the other hand, allowed for me to understand how engagement with the case (fieldwork, interviews, and even coding) illuminated my thinking on the importance, significance, and scope of the case. I found reflective memoing (the act of recording reflective notes, thoughts, and insights) to be a powerful educational tool to facilitate understanding of the case. In addition, it provides a time-stamp to my views at any given time. Memoing encourages the links between case and theory (Stake, 1995). Memos can serve to assist researchers from analyzing raw data to making conceptual leaps in relation to theory (Birks, Chapman, and Francis, 2008). In doing so, she or he is less likely to suffer from tunnel vision or making the data fit.

Coding. Coding proved to be a recursive process that involved data reduction and comparison. I first conducted initial or open coding, which is an attempt to reduce data to manageable chunks of information (Strauss and Corbin, 1990). Bryman (2012) considers coding as a recursive approach that, when applied correctly, will allow the researcher to generate theoretical ideas about the data. I then aggregated codes into categories.

Generating Categories and Themes. For me, this was the most challenging step of the analytic process. In conducting this case study, I sought to understand the case over a long period of time (about four total years when accounting for the pre-history, prior to programming) and from numerous perspectives. Through data collection, I created a veritable mountain of data. I incurred periods of self-doubt, in which I was fearful I was categorizing data incorrectly. During this process, I re-examined qualitative textbooks. Thankfully, the low moments were tempered by moments of flow and the occasional breakthroughs, which gave me a sense of euphoria. Gradually, I gained my rhythm and

started to uncover patterns in the data. I came to find that, much like writing, slow and steady wins the race.

During this phase of the process, I had difficulty discerning the categories within the data. As a visual learner, I began drawing relationships in the data through concept maps, which helped me come to understand what Egon Guba (1978) refers to as divergence. For him, categories should be consistent and grounded in the data, as opposed to being detached from the research setting. As an example, in what eventually became the theme of "The Social Mission of Music: El Sistemaness" I was confounded as to whether perseverance and grit (two frequent codes) represented the same psychological construct. As there were several other similar codes representing similar concepts, I came to categorize these as soft skills, which I found to be representative of the mission of transforming lives through music education.

Concept mapping between categories, such as the soft skills example above, I engaged in the method of constant comparison (Glaser & Strauss, 1969). This analytic tool was how I really came to understand the case. In this method categories in data are actively compared, and researchers add and subtract categories to arrive at salient themes in the data. In Appendix F, I provide one a concept map that represents one of the eight emergent themes of the case, as analyzed through the ecological-political metaphor.

Searching for Alternative Understandings. As my broader discipline is educational studies, I was conscious and critical in seeking to find alternative understandings in the data. Constant comparison also provide helpful here because I would find multiple patterns in the data and I juxtaposed the categories to find subtle differences. As an

example, given the multiple institutions in represented in this case, tight and loose coupling came to be a frequent issue. Through immersion, I found that music programs from elementary sites sometimes did not linearly flow to the appropriate district, feeder middle school. Though the district is decentralized and allows for loose coupling, this instance was better accounted for by the impacts of school defunding. Thus, the lack of FTE allocations at school sites, is an alternative theoretical explanation that better accounts for the problem.

A learning experience. There are a host of qualitative analyses and it is important for the researcher to determine which are best suited to his or her data set (Creswell, 2012). Thus, it is likely that some approaches may prove for fruitful than others. In this vein, I chose NVIVO, in part, based upon its robust ability to categorize nodes (codes) and cases (people, person, places, etc). My thought process what that I would categorize stakeholders in the case according to policy domains they represent such as founder, board member, staff, faith-based, higher education, etc. I hoped to examine patterns among groups. For instance, I desired to see if the four-pronged typology of social need was mediated by stakeholder group. However, as I became immersed in the data I realized that actors in the case often represented multiple stakeholders groups. For example, Dean Parker represents two domains: Dean of Wanda L. Bass School of Music and board member. Unfortunately, this tactic did not achieve the desired results.

Interpretation and tense. In his book, *The Art of Case Study Research* (1995), Stake notes that case study research is inherently historical, at times. The researcher, he contends, assumes a moral responsibility to implement a trustworthy account of the case. He favors case study research steeped in interpretation. To illustrate his preference

of case study research, he includes a sample of his own research on The Harper School, which is an examination weighing the merits of a policy enacted at a PK-12 school site.

When examining the nuances of interviewing, Stake notes, "Much of we cannot observe for ourselves has been or is being observed by others." Of particular relevance here is his inclusion of past tense. In his treatment of the Harper School, he implements several tactics to illustrate the historical or temporal nature of case study research. While it is written in present tense, he creates artistic spaces for actors and interviewees to reflect in their own words or through direct interviewing (as examples, Sgt. Bruce McClendon, p. 157) and Principal Hawkins, pp. 143-144), provided they afford the reader a particular insight into the case. When detailing, analyzing, and interpreting the case (chapters 4, 5, 6 respectively) I do the same.

Establishing Trustworthiness. Over the past decades, qualitative research has made significant gains in establishing empirical rigor and objectivity. Lincoln and Guba's (1980) four broad domains of credibility, transferability, dependability, and confirmability still stand as foundational guiding principles in qualitative research. In the four following paragraphs I address how I tackle each of these issues, respectively. In doing so, I increase the trustworthiness of this research.

Credibility is akin to internal validity. A study that suffers a gross lack internal validity precludes it from having merit. When addressing this construct the research is considering whether the data truly represent reality of the situation. Shenton (2004) notes the adoption of an established research design such as case study and its subsequent methods lends towards this, as the design has been refined. For Shenton, credibility is the single most important form of trustworthiness. Thus, he provides

fourteen forms of credibility. As research design is often a trade off, it is unlikely a study will accommodate all forms, addressing as many as possible is ideal. I summarize credibility as it relates to this study in Table 6: Credibility.

Credibility	Inclusion in this study?	If applicable, how so?
1) The adoption of research methods well established	Yes	Case Study and subsequent methods
2) The development of an early familiarity with the culture of participating organizations	Yes	I previously volunteered at the research site and understand its climate
3) Random sampling	No	Not Applicable
4) Triangulation	Yes	Multiple data sources
5) Tactics to help ensure honesty in informants	Yes	Participation is voluntary, I encouraged informants to speak freely, informants identities are protected through de-identification
6) Iterative questioning	No	This implies use of ploys or deception, which I did not employ
7) Negative case analysis,	No	Not Applicable
8) Frequent debriefing sessions	Yes	While informal, I met with my outside committee member to "talk through" the case
9) Peer scrutiny of the research project	No	Not applicable for independent research required for dissertation
10) The researcher's "reflective commentary".	Yes	I will employed reflective memoing
11) Background, qualifications and experience of the investigator.	Yes	I had previously conducted qualitative research and worked in community educational settings
12) Member checks	No	Executive Director ensured accuracy of timeline, enrollment and other key facts
13) Thick description of the phenomenon under scrutiny.	Yes	This study is theoretically grounded and has is driven by a conceptual framework
14) Examination of previous	Yes	Extensive review of the

research findings		literature, cutting across four policy domains

Table 6: Credibility of the Study

Transferability speaks towards the external validity of the study. For Merriam (1988), this is the extent by which the study (or in this research, the case) can be applied to external settings. In regards to case study, both Yin and Stake address the issue of transferability, albeit in slightly different manners, which reflect their orientation towards post-positivism and interpretivism, respectively. Yin (2009) delineates between level one (findings of the case study) and level two inferences (analytic generalization from the case). In relation to this research, I conduct level two inferences in advancing this research to other community-focused efforts in the de-emphasis of the arts. Stake, meanwhile, takes a more tempered approach to transferability, as he focuses on context. Still, he maintains that theoretically-driven case study research transfers across situations.

The question "How dependable is this study?" seeks to understand the reliability of the research, as presented by the researcher. Shenton (2004) notes that qualitative research is neither frozen in time or static, thus the ability to empirically test and re-test qualitative research is not possible. This being the case, he emphasizes the importance of placing value on detail in the research process. In doing so, the researcher can reasonably infer that her or his research could be repeated, in theory. Table 7 summarizes the dependability of this study.

Dependability	Inclusion in this study?	If applicable, how so?
a) The research design and its implementation	Yes	Case Study as design, interview protocol and site observation protocol
b) The operational detail of	Yes	Documented process for

data gathering		field note creation
c) Reflective appraisal of the project	Yes	Reflective Memos

Table 7: Dependability of the Study

Qualitative researchers often pursue research that aligns with their worldview, values, and philosophical positions for these reasons, among others, they are at high risk of overtly or covertly influencing results their biases. Confirmability relates to the importance of ensuring findings are attributable to the data and methods, rather than the researcher's preconceptions. Triangulation, as previously discussed, is one means to enhance confirmability. Shenton (2004) addresses two more: the research admitting her or his preconceptions and the creation of an audit trail.

Part IV: Metaphor Creation.

In this section, I discuss how I came to adopt the ecological-political metaphor (EPM), which serves as the theoretical tool by which I research question number one. When utilizing a theoretical lens in qualitative research, Patton (2005) cautions that researchers must be cognizant not to impose meaning onto the object of study. Initially, I considered a different theoretical lens, which I abandoned due to this very fact. I desired to maintain the essence of the case, which concerns the exertion of capital and political mobilization in the local community. Through the analytical method of constant comparison I came to categorize key themes and events in the case, according to the metaphor.

This theoretical lens doesn't fit! Having already selected my topic of study and developing my prospectus for this research, I examined several theoretically compelling articles. At this point, I had already settled on problematizing social need as a construct

due to my prior experiences of working in community settings. I found this concept fascinating and determined it would be well-suited to a case study approach.

Around the same time I became familiar with ESO, I became acquainted with R.L. Warren's (1967) conception of the inter-organizational field in the community development literature. By inter organizational field he maintained that a new field comes into focus once a minimum threshold of political actors come into existence. As this case involves collaboration between stakeholders from organizations representing three sectors (two faith-based, one higher education, and PK12 schools), I reasoned it may be evident of an emergent inter organizational field of orchestral music education.

This is consistent with Warren's conception, as he placed strong emphasis on environment. However, much like my failed attempt to categorize individuals by organizations, I found that actors represented multiple organizations confounded this theoretical concept. Thus, I abandoned it early during the research.

Scoring with the ecological-political metaphor. The primary reason I came to select the ecological-political metaphor is because it allows for me to unpack the significance of the case in terms of politics and policy within the local ecology of the community. As I became oriented to the case, I was fascinated by the existence of multiple stakeholders uniting around the central mission of the transformative power of music.

The EPM is what Marshall and Rossman (2006) refer to as a analyst-constructed typology, which is to say that it is not used explicitly by participants. In this case, participants do not refer to El Sistema Oklahoma (ESO) as a game involving actors of interrelated networks. Nor do they use the language of investing capital, choice structure, rule formation, or endorsement by the local community. However, these

concepts are consistent with language and actions represented in the case and that is important.

The EPM provided the value-added benefit of allowing me to develop successive, related metaphors to make sense of the categories. Metaphors are an established practice in qualitative research, as they can provide readers a handle to better understand key concepts (Angrosino, 1994; Schmitt, 2005). I intended to structure the write up this research differently, but the metaphor usage afforded by the EPM became central in the provision of a chronological account of the case. In fact, by situating myself within the case through field notes, I implemented what Van Maanen (1998) refers to as an impressionist tale. In this approach the lines between the researcher and the researched are purposely blurred as to draw attention to the culture under study or, in this case, the local community under study.

Chapter 4: The Context

The purpose of this chapter is to convey the context of the case, which includes the influence of the founders of ESO, as well as the backstory of key institutions represented in the case. In an effort to communicate the case in a logical, authentic manner, I draw upon Clandinin and Connelly's (2000) views of narrative inquiry. They present narrative inquiry as a cohesive strategy to understand experiences through boundaries, which is a catch-all term to emphasize the importance of temporality (time), people, action, and certainty.

They adopt the term boundary to reflect, "the intellectual territory of another way of thinking" (p. 21). As this research seeks to view the community as an interconnected ecological system seeking to address the problem of lack of music education, it is important not only to understand the lived experience of key actors but also the institutions they represent. Both persons and institutions have ethoses (grounding beliefs) that inform actions (Bellah et al, 1985). In this chapter, I labor to draw them out, so that the reader can better appreciate the context of the case. Further, as this research employs the ecological-political metaphor as a theoretical frame, it is especially salient to provide a thick description of the system in which the case operates. I accomplish this through integrating documents, field notes, and interview excerpts. I also relate the context to relevant social theory where appropriate.

The object of this inquiry, El Sistema Oklahoma (ESO), emerged through a collaboration between three anchor institutions in the community. In this chapter, I provide the founders' story, which bears the relationship between the two institutional partners (Wanda L. Bass School of Music at OCU and St. Luke's United Methodist

Church) who jointly founded ESO. I discuss the importance of OKCPS as a resource provider and the school choice environment in which PK-12 schools operate. I also note the importance of Trinity International Baptist, which serves as physical location of the program, and the critical role played by the Oklahoma City Public School Foundation.

As a point of clarification, I conducted semi-structured interviews with all three members of the Search Committee. Each of them recalled elements of the same story, but with different perspectives. Given the importance of the ecological-political metaphor, I treat their investment (or de-investment) in the case as evidence of choice structure. In this section, I seek to unpack this choice structure from the perspective of each interviewee.

The Founders' Story: "They Were Really Looking to Invent Something."

I begin with the founding process for two reasons. First, it provides context to situate the case. Second, research tells us the founding story impacts future decisions in a host of ways. It also shapes organizational culture (Schein, 1989), especially in entrepreneur-driven programs (Kessler & Frank, 2009). Thus, the rationale to begin with the founders' story is empirically-based.

In 2000, Phil Busey was overcome with stress and faced with a career-altering decision. He asked his wife, Cathy, what their next move should be. In many ways, Cathy serves as Phil's anchor by calming him and providing perspective. In this instance, she pulled him into the kitchen reminding him they were blessed to have happy, healthy kids. This proved to be all the inspiration he needed. According to Phil, "She knows I can get up and do something. That's the way our relationship has been through our lives." Shortly thereafter, Phil leveraged his knowledge to create Delaware

Resource Group (DRG), a defense contracting company. As testament to their teamwork, Cathy, who majored in piano in college, went to work at their church, so the family could have medical insurance. By 2013, the company had grown to 700 employees and 50 international locations with revenues totaling $80 million annually (Burkes, 2013).

The year 2013 proved to be significant in another respect. It provided a time to reflect upon his life and legacy. Throughout their business endeavors, Phil and Cathy maintained strong connections to their alma mater and faith through the local church. A member of the Cherokee Nation and Delaware Tribe, he earned his juris doctorate from Oklahoma City University (OCU) in 1977. Coincidentally, he and Cathy had both met at OCU as undergraduates. Driven by their faith, the Buseys had long been active philanthropists in their community funding scholarships and supporting civic organizations.

The Buseys, once again compelled by faith, endeavored to make some form of transformative change in the community. As Cathy put it,

> Daily, weekly, we get request for people saying will you give us some money and here is what we're doing. It sounds wonderful and it sounds great and we have contributed to some of those but we kind of wanted to contribute to or create something that might outlast us. The company has grown more than we ever dreamed possible and through that all was still our faith. Through our faith, we know that it's our obligation to give back some of what we have been given.

Individually, the Buseys had very different experiences in seeking to support PK-12 school sites in OKCPS. Cathy stated, “Phil and I had been interested in creating some time of a program to give back to schools, churches, and the community. It seemed like one of the biggest needs was after school program.” Previously, Phil had sought to unify

with other business leaders to develop programs focusing on job training, but was stymied. He said:

> When I started the Busey group before we got DRG going and during that time was trying to work and get commitments to help train and get resources just to -- about opportunities, jobs and what could happen in empowering students through different programs and work with some of the schools to do that school districts…What happened was, when I learned, the Oklahoma City business and this is not a negative thing about that. The business community, the leaders of the community at this particular time, there is going to be money that was going to be voted on by the state legislator for education in Oklahoma. I thought this was going to be powerful. This was going to be something that could really go down to the schools. It could be a real thing for the teachers. Their vision was, no. I talked to several CEOs and their vision was, no, no. We're going to use the money because we need to create testing criteria.

This lengthy excerpt is an excellent illustration of how politics and funding influence PK-12 schools. Though the details are unclear, it seems that Mr. Busey tested the possibility of forming a coalition around developing job or career training, but faced opposition in the form of a political climate favoring accountability standards, as opposed to workforce development. Presumably, this experience would come to shape the Buseys' philosophy of retaining control over developing a program, potentially increasing the appeal of El Sistema while forging a partnership with OCKPS, as opposed to working directly through the school system.

Cathy, on the other hand, had much different experiences with PK-12 schools. She had been involved in a church afterschool tutoring program at Graystone, an OKCPS elementary school. Cathy stated:

> So I had seen some after-school programs. I had a music background when music was kind of a saving grace for me when I was growing up doing the piano and then later doing the organ were away that I could escape the environment that I was in. But knowing that kids are not getting to experience that, especially children who are in poverty. Even if they have a little bit of that at school, they are not getting much and they certainly are not getting that after school.

Clearly, Cathy's childhood experiences in playing music, teaching music, and being around after school programs impacted her decision making process when it came to developing some form a transformational program. This is important because we see that inequality and lack of music opportunities within the district were a driving force behind creating something.

Up to this point, a large portion of their personal giving had been directed through the missions of St. Luke's, other churches, or OCU. As an example, the Buseys' were already supporting a two-week arts program. Due to his business successes, Phil has guest lectured at the OCU Mienders School of Business and he is also serves on the board of trustees at the university. And, while both OCU and St. Luke's are Methodist institutions there was limited overlap between the two. That was until Mark Parker, the Dean of the Wanda Bass School of Music, whom Cathy describes as visionary, reached out to the Phil to ask if the Buseys' would be willing to help sponsor an event at the Oklahoma History Center. Phil agreed and they were surprised to receive tickets to the events. In fact, Cathy recalled, "I thought we'd be sitting in the back, but lo and behold we were right up front at a designated table and that was when we first got to know Mark."

Phil and Cathy's shared values with Dean Parker played a central role in conceiving El Sistema. Cathy stated, "His views are my views. He has a love of OCU, we have a love of OCU. Love of church." In my interview with Dean Parker, he noted the importance of the Buseys' entrepreneurial spirit when it came to developing ESO:

> It was about El Sistema from the beginning. They were really looking to invent something. They had tried a couple other workshops, and short-term programs that I heard about. I told them from my experience, starting from scratch, I haven't seen much success with that either here or other places. Let's look at the models that are out there and see if there's one that's what you're thinking about.

Dean Parker appears to be a pragmatist. He recognizes the multitude of problems with starting from scratch, so he advocates for looking at existing models.

Cathy and Mark quickly realized they shared an affinity for music appreciation and creation, as well as a deeper desire to create positive change in the community. Dr. Parker and the Buseys kept in frequent contact. As Phil told it: "Mark was a dynamic kind of guy and have a lot of really good ideas. Cathy shared with him kind of what we were looking to do and that is when he brought back a DVD [which documented the origins of El Sistema in Venezuela]."

Cathy became so inspired that she would share this information with almost anyone who would listen to her. She told a staff member at St. Luke's who did some internet research and found the largest El Sistema affiliate in the United States, YOLA (Youth Orchestra Los Angeles). Dean Parker noted: "Right away, they thought, this is what we're thinking about. Cathy went to LA and saw it firsthand. It was pretty quickly decided that El Sistema was the choice out of the different ones that we talked about."

They were impressed with YOLA, especially the social mission. Cathy recalled that when she and Julie gave the cab driver the address, he asked if they were sure, implying this was a rough part of town. They went on site and observed a routine day. For Cathy, without question the most remarkable feature of the experience was the engagement of the kids. In telling this story, Cathy recounted how amazed she was in being told that parents and community members would come just to watch recitals. This experience cemented El Sistema as the means to accomplish the initial vision of community change through an after school program.

The founding story teaches us many lessons, especially in light of the ecological-political metaphor that gives focus to this inquiry. A useful extension of this metaphor is to consider the Buseys as game developers whose lived experiences contribute to a particular design aesthetic. Thus, a central lesson is that lived experience matters. In no certain order, their entrepreneurial spirit, faith, music, and experiences in PK-12 schools serve as a backdrop. Then, a confluence of factors came into shape at the right time, namely, their willingness to reflect on legacy, connection with Dean Parker, and Cathy's zest in pursuing this cause.

Another significant factor was the Buseys' ability to leverage varied forms of capital in exploring El Sistema as a viable option for Oklahoma City. This included extensive networks of social capital, which extended across the community and were deeply rooted in St. Luke's United Methodist Church and Oklahoma City University. Cultural capital is also evident as we see the opportunities afforded from education, being business owners, and knowing how to navigate complex institutions. This becomes further amplified in year one of the case.

Yet another lesson can be found in the fact that the founders' were not seasoned philanthropists with an agenda to influence politics or educational policy. The aforementioned research of Reckhow (2012) demonstrates that philanthropists and private foundations tackle social problems differently. This is a case of a couple committed to, again in their own words, "doing something big." When considering what type of program to develop in Oklahoma City, the founders reiterated they were open to many possibilities, including something beyond music education. El Sistema as a model, coupled with their deeper appreciation for music and the arts, just happened to be the vehicle to achieve a deep desire to, in their own words, "do something transformative for the community."

As we will see in the next section, the founders drove the two initial steps of the ecological-political metaphor, including identifying the game and setting its initial rules. Further, their decision making processes echo those identified in the research of Autio, Kenney, Mustar, Siegal, and Wright (2014). These authors note entrepreneurs have a tacit tendency to survey a landscape and employ innovative processes. Clearly, for Cathy, her perception of the biggest need was an after school program for children. Her personal experiences with music, as well as her Methodist faith and educational experiences at Oklahoma City University factored into the conception of ESO.

OKCPS: The Public School Environment.

The current sociopolitical climate of public education across Oklahoma could best be described as both tenuous and uncertain. Prior to this research, Oklahoma had become one the 46 of the 50 states that adopted common core standards. Also during this time, the previous Oklahoma State Secretary of Education (an elected position)

retired after being in office for 18 years. This led to a contentious election cycle, which was amplified by national concerns of educational policy and accountability standards.

The incoming State Secretary adopted School Report Cards in an effort to increase transparency. Oklahoma then became one of the twelve states to repeal Common Core, which resulted in PK-12 schools adopting the state's Priority Academic Success Skills (PASS) to assess students. From a policy standpoint, educators and state leaders furiously developed new standards. During the data collection phase of this research (eight months) the recently-elected State Secretary lost election after only one term. Thus, at the state level, leadership, curriculum, and standards were all in flux.

Oklahoma City Public Schools (OKCPS) is the largest school district in the state. The district spans 134 square miles and includes 60 elementary, 17 middle, and 13 high school sites. In the 2011-2012 academic school year, 33,148 or 91.2% of students were eligible for free and reduced lunch ("About OKPCS", n.d.). Like those across the country, the school district is mired in the complicated environment of NCLB reauthorization and increased standards.

OKCPS is a decentralized, school choice district. According to OKCPS website:

> The greatest degree of local control remains a parent's ability to choose one school over another. Choice basically means options, and in the state of Oklahoma we have five options that allow families to attend their school of choice. They include charter schools, virtual charter schools, home schools, and scholarship opportunities to attend private schools (State Department of Education, 2017).

Strangely, the fifth option is not mentioned. Most likely this is one's default PK-12 school. As discussed in the literature review of music education, at the state level there have been some nonprofit-related efforts towards addressing the de-emphasis of

arts education in PK-12 school including the Oklahoma A+ Schools Program and Any Given Child. None of the school sites represented in this case were affiliated with either one of these programs.

Local control and the arts. OKCPS does in fact provide fine arts instruction at all 90 school sites, which is quite a feat for a district of its size. However, which forms of instruction are available vary widely. According to Susan Gabbard, OKCPS Fine Arts Director in the mid 2000s, NCLB legislation adversely influenced fine arts offerings:

> We had lost strings programs at one time back in the early 2000s. I think it was before I came to work, and then because of budget cuts and money a lot of them--about half of the elementary strings programs went away.

Present-day, school site politics and politics continue to effect curricular offerings of fine arts instruction. One such example is how local control is actually manifested at the school site level. Rhonda Taylor, current OKCPS Fine Arts Director, noted:

> One strange thing to outsiders is that our principals choose programs….for example, [let's say] you're a principal -- I'm making this up -- they'll say, "Here are your 50 allocations. Now you can hire 50 teachers." You can decide how many of those are arts teachers, but you have to provide all of these other things. So it looks different. The problem related to El Sistema is the elementary students…they may not always feed up into a middle school healthy program or high school.

In her thought experiment, Ms. Taylor cuts to the core of the issue, principals are making tough curricular decisions with a limited availability of funds.

A byproduct of decentralization can be inconsistency across school sites, especially in large districts (Brown, 1990). It is beyond the scope of this research to argue whether this is a good or bad thing. Rather, I examine the issue of

decentralization as it relates to this case. In my view, this quote on inconsistency in feeding patterns can be interpreted at least three ways. The first is inconsistency across school sites. As Mrs. Taylor notes, secondary feeder schools may not have the same types of program as elementary and middle schools in the same feeder pattern. As an example, an elementary may have a band program, but the middle school students feed to may have orchestra. Said Mrs. Taylor: "as they feed up to their appropriate middle school or move to a different middle school those same programs may not be available." In fairness, this could also be considered an equity issue, as feeder schools may lack the financial resources. The larger point here, however is lack of coordination among school sites that may manifest due to decentralization.

The second is also a staffing issue, but relates to teacher experience. Imagine a scenario in which a school has an established strings program and the music teacher leaves. In turn, the principal allocates a FTE position to a music teacher the next academic year. However, the best (or only) music teacher available specializes in band. Given the teacher shortage affecting the state, such a scenario can happen and has happened. The Fine Arts Director noted:

> Let's say that Roosevelt (Elementary) has a Strings program and then the teacher moves. Then they hire somebody who is band and not strings, my advice is that they learn to teach strings quickly like a former teacher did when she was at Belle Isle (Elementary), and keep that program afloat…. So it's a little trickier than it sounds to secure programs.

The third complicating factor, is lack of instrument availability across the district, which is an equity issue. The fine arts budget often does not cover instruments, so parents, guardians, and/or school site booster clubs are counted on to provide instruments. Regarding instruments, the Fine Arts Director of the District stated,

> That [instruments] is our greatest need, period, in all of our arts programs. Other than a bond that may work itself out in a year or something. We don't have an easy answer to that because in other districts the parents not only provide the instrument but they'll pay up to $2,000 and actually sometimes it's more for band fees.

In effect, this becomes an issue of supply and demand.

If parents and guardians lack the financial or political capital necessary to pay for or raise funds for instruments, there is no demand for instrumental music programs. In cases such as these, the principal might be forced to make a decision like this scenario proposed by Mrs. Taylor:

> Well, [the principal might think] four classes are going to be music appreciation because we have a billion kids with no place to put them in specials, and we're going to throw them into music appreciation classes." This illustrates how policy and resources may result in lack of music education equity across a large district.

In theory, school choice allows for parents to choose the school that best fits the needs of their child. One such factor is curricular offerings, which includes the availability of arts education. More specifically, this could include strings, band, or even guitar (which is available at some school sites in the district). Surely, this factor would likely be weighed against several others. This example demonstrates, however, how politics and budgets may play out in reality. For better or worse, principals have the discretion to allocate FTE positions within the school site and, as indicated in through interviews, these offerings may change due to staffing needs, turnover, and teacher expertise.

The impact of decentralization. Inconsistency of music curricular offerings as illustrated in OKCPS relates to two key concepts that may plague PK-12 school policy. The first is the obvious limitation of operating with severe budget limitations, which affects all PK-12 schools. Administrators at the district and school site-level are

attempting to meet a host of demands, and often lack the financial resources to accomplish this daunting task. That being said, there is something we can learn from how these choices relate to the fine arts, especially given their de-emphasis in PK-12 education.

The second issue is more subtle and relates to how loose coupling manifests in decentralized school districts such as OKCPS. Karl Weick (1976) made a distinction between tightly and loose coupled organizations. In the former, administrator or employee responsibilities are clearly defined, coordinated, and they are managed closely. Loosely coupled organizations, on the other hand, differ primarily in autonomy, as administrators or employees operate without close supervision.

In Weick's view, loosely coupled systems often produce more desirable results and are flexible and adaptive to pressing needs. For him, the absence of regulations and bureaucracy are desirable, as this speeds up feedback times. Loosely coupled systems also benefit from highly connected networks, as individuals have the autonomy to make decisions. Interestingly, Weick's original research cited the U.S. Educational system as a prime of example of a loosely coupled organizational system. In many respects, this changed with the dawn of the accountability era. However, decentralized environments allow for looser coupling, as compared to centralized districts (Lowe & Crowson, 2002).

In OKCPS, we see how decentralization allows for principals to allocate FTEs. In theory, this flexibility allows for them to better meet the needs of their community. However, this decision is significantly hampered particularly in high poverty districts, which lack of financial resources and have increased teacher turnover.

The Wanda L. Bass School of Music

Oklahoma City University is a private, urban, liberal arts institution of approximately 4,000 students that holds an affiliation with the United Methodist Church. Due to its religious affiliation and geographical location, the university has a strong commitment to service, which is evidenced by its vision to link student intellectual, spiritual, and moral development to the community in which it resides. According to US News Magazine, it is ranked the 23rd best regional university in the west ("Best Colleges," n.d.).

OCU prides itself as a fine arts institution and is consistently regarded as a haven for and leader in artistic education including the performance, visual, and music arts. In fact, the Fine Arts Building was the second building built on campus and is where the Oklahoma Chapter of the Music Teacher National Association, as well as being the first performance site for the Oklahoma Ballet. Currently the Wanda L. Bass School of Music at OCU hosts, the Oklahoma Children's Theater, Oklahoma Youth Orchestra, the Canterbury Adult and Children's Choirs, and a Performing Arts Academy. The university has a strong international student body, as it consistently draws students from around the globe.

OKCPS Foundation

As I will come to detail in analysis of year one of the case (chapter five), the Oklahoma City Public School Foundation (OKCPS Foundation) played a formative role in the early stage of ESO. In this section, I introduce the OKCPS Foundation, including its strategies to support schools across the district. As there is much social confusion

regarding public school foundations (Else, 2002), I digress to provide a brief historical overview of public school foundations, which includes their origins and strategies in supporting PK-12 education. It is noteworthy to mention that I reserve evaluations of public school foundations until analysis in chapter five.

Lampkin (2003) notes public school foundations serve as a medium for citizens and private businesses to become financially supportive of schools. In his view, there are two significant drawbacks to public school foundations: their inability to politically organize the public around educational reform and their inability to create programs.

OKCPS Foundation charter strategies. In 1984, citizens united to found the Oklahoma City Public School Foundation. An early flyer announcing its establishment reads, "private donations generated by the Foundation will be used to complement existing educational programs. Consequently, enrichment programs and learning materials above and beyond those which would normally be offered can become a reality" (Lease, 1988, p.163.) After a brief founding period, charter goals were adopted on July 9, 1985 and are summarized in Table 8.

	Goals
1	Create the motivation which stimulates excellence and provides quality education in public schools.
2	Through effective communications, promote enhanced understanding and cooperation between public schools, the private sector and the community.
3	Create community awareness, interest and confidence in public schools. Promote, sponsor and expand quality educational opportunities and programs.
4	Support the Oklahoma City Public Schools as they strive to become a model urban school system.
5	Provide funds and services which support quality public education beyond the parameters of the local school budget

Table 8: Charter Goals of OKCPS Foundation, adapted from Lease (1988)

Consistent with the research outlined above, the OKCPS Foundation has undergone several changes in tactics and strategies to support OKCPS schools. At its outset, the foundation funded program initiatives and teacher grants. The first grant

cycle (1985-1986) sixteen "Interest Grants" were funded, one of which was a pilot program to develop survival skills for latchkey kids (Lease, 1988). Though the details of this grant are not readily available, given the focus of this one example, one could assume it is an excellent illustration of educational foundations addressing a social problem facing PK-12 schools through potentially innovative means.

OKCPS Foundation strategies at time of research. In 2012, as ESO was forming, the OKCPS Foundation had adopted a four-pronged strategy. The first was meeting teacher needs. According to an interviewee on staff at the foundation during this time, "It was the teacher grants, it was the how do we take -- how do we fill the gaps that are really obvious….unfortunately, it wasn't very effective." This statement echoes Else's (2002) assertion of educational foundations striving to fill in gaps. He continues, "Half of the partners didn't even realize that they at one point signed up to -- their relationship had lapsed." Lack of effectiveness may be attributable to messaging and frequent changes in strategies, which plague public school foundations.

The second strategy was competitive edge grants, which was a process by which students could apply for funding for activities such as robotics competition, provided certain requirements were met. The third strategy was national board certification. Teachers could apply for scholarships for test preparation and fees.

The fourth and final strategy was "Teacher's Warehouse." This program allowed for materials to be retained in district and stored for future use, as opposed to being discarded. Essentially, it can be viewed as a response to the challenges of addressing turnover and teacher relocation both of which occur frequently in large school districts such as OKCPS. While not highly strategic, it proved mildly effective in

reducing out-of-pocket expenses for teachers, which is a significant problem in high poverty school districts (Johnson, 2006).

Trinity International Baptist Church

A superficial understanding of this case would likely dismiss Trinity International Baptist's role in the case and simply regard it as the physical location of ESO, but that would be an oversimplification. While it is true that its geographic location made it an ideal collaborator, understanding the backstory of the church contributes to an understanding of the ecological system in which this case operates. Specifically, it underscores the ethnic diversity and gentrification of the community, which characterizes Yosso's (1995) aforementioned bi-lateral view of social and cultural capital.

Period of decline. It is almost unimaginable to fathom that an urban church with a rich history and approximately 50,000 square feet of space could dwindle to a congregation of 30, but that is the position in which Trinity International Baptist found itself in 2012. Back in 1907 (the same year as Oklahoma statehood), Trinity was first organized as a Sunday School. It then became the First Baptist Church Oklahoma City in 1911. According to the current pastor, Tobin Jackson, "There was a lot of decline. Beginning really in the '70s and '80s, neighborhoods changed, a lot of things changed, the outreach that needed to happen didn't happen and you go from -- in '75, they had about 1800 so you go from '75 to -- and by 1998, they were at 150. So progressive downward spiral to 30 in 2012."

Throughout this decline, Trinity combated changes in neighborhood demography and gentrification by committing to serve community enclaves through the

creation of ethnic missions. In a news magazine feature, Parker (1999) explains: “A Laotian mission began in 1982, a Korean mission in 1994, and last August [1998] a Chinese mission.” This commitment to ethnic plurality culminated with the decision to rename and rebrand the church "Trinity International Baptist Church" in the late 1990s. Parker speculates this may be the first time an existing, local church has renamed itself an international church.

Despite some gains in outreach and local missions, almost a decade later the church found itself faced with the most critical of decisions. According to current Pastor Tobin Jackson, “Trinity was at a place where they had to make a decision whether to close the doors and walk away.” By August of 2012, there were only 30 active congregants! They prayed, met, and voted to stay. Tobin noted this was a huge conviction of faith, saying:

> They've been without a pastor at that point for two years and the sanctuary was shut down due to the ice storm of 2009. So they had not worshipped in there and since 2010. The trustees made a commitment to conduct a pastor search in earnest.

On the upswing. As he told it, Tobin Jackson is about as unlikely a pastor of an international church as one could imagine. His friend and pastor was serving as interim pastor and invited Tobin to come, meet the congregation and preach in December of 2012. Tobin was a youth pastor of twenty years, but was looking at a transitional point in his life. There may have only been twenty people in attendance when he preached. In his own words, “It was amazing. They were full of life. They loved us…this became a unique opportunity and I accepted the call to minister here.”

In the late 2000s, prior to making the decision to hire Tobin, the primary ministry and source of income keeping Trinity financially afloat was its operation of a

DHS-certified child development center of about 100 children. Unfortunately, the church had arrived at a point that operation of their large facility was no longer financially viable. At that time, the trustees were considering whether to close the child development center. As this was the church's primary source of income, doing so would translate to almost certain doom. It just so happened a representative from DHS contacted one of the two childcare centers operated by St. Luke's United Methodist Church. Phil Greenwald, Operations Pastor at St. Luke's United Methodist recalled:

> We [he and the childcare director at St. Luke's] received a call and went to investigate it. What we discovered was they were really struggling as a church because their population had declined and they were no longer able to manage the business operation childcare center. But they had a great facility and so the director and I said what if we were to lease the facility and we'll run it as St. Luke's childcare…we made an arrangement with their church: we lease the building, run the childcare, and pay them a percentage of our revenue.

Evidently, leasing the childcare center kept the church on life support, so to speak, and during that time provided enough of a spark towards hiring Pastor Tobin. Reflecting on this time period, Phil Greenwald from St. Luke's noted:

> If I had a crystal ball at the time, I would have said St. Luke's will ultimately have the opportunity to purchase Trinity Baptist church and continue expanding our ministry to that location, but they turned around and they used that money to go hire a bright young pastor [Tobin]. All of sudden there's a little bit of life infused in the church and now the church starts growing a little bit.

St. Luke's United Methodist Church

St. Luke's United Methodist Church is located in downtown Oklahoma City. It has a long history of service in the community, particularly around the arts. From 1963 to 1990, the church hosted an arts festival every spring. In 1992, this program was

renewed and expanded into a concert series. Today, the church offers eight unique arts and music ministries, all of which are relate to St. Luke's mission of supporting, "love and worship behind all aspects of music which support, strengthen, challenge, and celebrate the creative spirit of the church" ("Ministries," n.d.). The church recently established an additional campus in Edmond, OK, a neighboring city.

St. Luke's has been involved in after school programs in the downtown Oklahoma City area for about 15 years. According to Phil Greenwald, Executive Pastor, this is attributable to Dr. Bob Long, who serves as senior pastor at St. Luke's. Phil stated: "[Dr. Long] had a vision for how could St Luke's be involved in ministries that relate to education believing that the Methodist church has had such a history of work and education." A staff member at St. Luke's brought forward an idea to create an after school arts-based program, Studio 22, thirteen years ago. Today, It continues to serve kids aged 11-18 and its mission is to help children develop a strong, healthy self-esteem and resilience against at-risk behaviors.

During my interview, I asked Phil "What drew the church to El Sistema?" First, he made a point to note that Studio 22 is continuing to do excellent work and fulfill its mission as a small group experience. Then, he notes that Dr. Long desired a means to reach a larger number of people so that the church could make a broader impact. It was at this time that the Buseys came to visit Pastors Long and Greenwald to share their recent discovery of El Sistema and tentative discussions with Mark Parker. Phil stated, "in conversation largely with Bob Long, Phil and Cathy asked is this something you would even consider learning more about. He said yes, so we learned about it first and I learned about it first by watching the video from 60 minutes." As discussed in "The

Founders' Story," Cathy went with the Director of Studio 22 to Los Angeles to witness Youth Orchestra Los Angeles.

Early on, and throughout the three-year process of El Sistema Oklahoma, St. Luke's has provided multiple forms of capital. These include human capital in the form of Phil and other staff members' time and energy, and much-needed organizational infrastructure. In fact, Pastor Greenwald, one of the church's three executive leaders, became the driving force behind St. Luke's involvement with ESO. Consistent with development of its other ministries, St. Luke's provided oversight in the form of administration, budgeting, even would even come to provide health insurance to ESO's two full-time staff (Executive Director and Site Coordinator). Over the course of the next three years, the resources of St. Luke's (and OCU) proved to be a Godsend for a host of reasons.

In this chapter, I introduced the key players in the game of orchestral music education that will soon unfold. I provided the backstory of the institutions represented in the case and stakeholders that represent them. In the next chapter, I continue to develop and contextualize the case, while also applying the ecological-political metaphor. I examine the game of El Sistema Oklahoma, its rules, how they changed over time, and consider how various policy actors endorsed ESO as an alternative form of education in the community.

It is important to reiterate the importance of the founders' interconnections with OCU and St. Luke's. Both of these institutions and the stakeholders that represent them (Dean Parker and Pastor Greenwald, respectively) have significant resources and capital. I regard Dean Parker was the central catalyst in the case, as he connected the

Buseys to the philosophy of El Sistema. Pastor Greenwald's knowledge of operations and his connection with Trinity International Baptist provided the Buseys the opportunity to begin achieving their vision of bringing the program to Oklahoma City.

Chapter 5: Analyzing Year One Through the EPM

While chapter four detailed the bounded system in which the case operates, chapters five and six serve as analysis of the case through the ecological-political metaphor (EPM), thereby addressing research question one. Seven themes emerged through the EPM. The first three themes occurred squarely within the first year and are addressed in this chapter, and can be found in Table 9. The other four themes span the entire time of the case and are addressed in chapter six.

Themes	Applicable EPM	Events
Setting the stage	Game Defined	• The Plan of Engagement: "I don't start at the bottom. I start at the top and work down" • Getting Trinity on Board • Philosophy of Community Engagement • "They Were Us, We Were Them." • Hiring of Executive Director • A New Game in Town: El Sistema Symposium
Identifying the Players	Rules Established	• Holding the Cards: OKCPS • OKCPS Foundation: An Unlikely Playing Partner • Getting Schools on Board • Another Chair at the Playing Table: The Busey Chair of Music Education: • Hiring of Site Coordinator: "It's about service" • Identifying ESO Teaching Faculty • Recruitment Getting the Word Out to Principals.
Redefining the Game: A Change in Leadership	Setting the Rules	• New Rules: A Change in Leadership • Regrouping • Re-balancing the Game Board

Table 9: Emergent Themes Occurring Through Year One

Year one may best be viewed as El Sistema Oklahoma (ESO) emerging through overlapping networks between actors and institutions within the local community. This chapter is about vision becoming reality, the many challenges faced by stakeholders, and unexpected twists that occurred along the way. As indicated in methods, this is a multi-method study. This chapter, however is largely historical, thus data sources are largely comprised of interviews and documents. Chapter six, however includes field notes, as those four themes occur during my fieldwork.

Setting the Stage: Defining the Game of Orchestral Music Education

In this section, I discuss how early actions of the founders worked to set the stage of the game that would soon be orchestral music education. These actions begin with a tentative meeting with OKCPS to ensure they would be on board with ESO, locating a physical site for the program, and the Wanda L. Bass School of Music's involvement. I then discuss how the Search Committee came to hire ESO's first Executive Director. This section culminates with OCU hosting an El Sistema Symposium. I examine all these actions through the ecological-political metaphor and pay particular attention to the symposium as it provides a detail-rich example of how ESO was framed to the local community.

The plan of engagement: "I don't start at the bottom. I start at the top and work down. In the early stages of conceiving ESO, Cathy and Phil Busey wielded their considerable capital to schedule a meeting with Carl Springer, Oklahoma City Public Schools Superintendent. Based upon Cathy's experience at YOLA, their vision of ESO was that it would operate after school. This, coupled with their previous experiences in school reform and programming, led the Buseys to secure buy-in from OKCPS. In this

partnership, they sought to be able to recruit into schools and determine if working out some form of transportation services would be possible. Cathy's strategy becomes apparent through a telling quote, "We had a meeting with Carl Springer. I don't start at the bottom. I start at the top and work down. Each time we wanted something we went back to the top, so that the principals would even know that this came from the superintendent down."

As they began to tell him their vision for what ESO could look like, he asked them to pause so that he could invite the then-Fine Arts Director, Susan Gabbard, to this meeting. Since this meeting was at the OKCPS Administration building, Susan's office was just upstairs. As Susan told it, she was happy that she was available that day for the meeting:

> When they started talking, he [Carl] said, "I want our director of fine arts to be here." Thank goodness he said that. We [Susan and Carl] had a rapport. So many times the fine arts people don't get involved, but we had a connection. We had actually taught at the same school for about a year and half. He said I want to invite Ms. Gabbard to this meeting, she can really be of help to you.

Susan had been director for eight years and was well-connected within the district. Her inclusion at this first meeting proved critical, as she was able to understand the founders' motives, vision, motivation, and goals. She recalled: "They didn't know where to start. This was great because I did know how to help them…I knew all the principals and all the teaching personnel so anyway I came and listened to them and what they wanted to do and it was fantastic."

The meeting went well. As Susan told it:

> He [Superintendent Springer] said, why don't you think about what schools and principals we need to talk to get the buy in to help promote this because that was a very critical point. You

> know to get them started was to find the right people the right schools the right atmosphere and so we had a number of OK A+ Schools, which are arts integration schools. So naturally I thought of them because there was already a commitment of the arts in those schools. We wanted as close as proximity as where it was going to be based out of.

Susan recognized the value in school climate. She reasoned there would likely be carryover over in both leadership and school climate from the OK A+ School movement. From the Buseys perspectives, Carl and Susan shared the mission of ESO and expressed enough interest for the Buseys to proceed towards next steps, which would include increased engagement with OCU and St. Luke's.

Over the next few months, Cathy would heed the call to search for a physical site for the program and examine which staff to hire. With the consent of the Superintendent, Mrs. Gabbard would help the Buseys identify school sites and coordinate services from the school, namely transportation. The meeting ended with a commitment to meet again.

Getting trinity on board. As Pastor of Operations, Pastor Greenwald was tasked with heading up the search to find a suitable location. St. Luke's did not have space, so he briefly looked into commercial buildings, schools, and other churches. The connection and working relationship between St. Luke's and Trinity International Baptist in providing childcare proved important. Another critical factor is that Trinity International Baptist was well-positioned both in the district and in location to OCU (being literally one block east of the Wanda L. Bass School of Music). As aforementioned, the community surrounding Trinity had changed dramatically over the years. Due to gentrification within Oklahoma City, Trinity was square in the middle of a number of high needs elementary schools.

As Phil reflects on the decisions surrounding Trinity housing El Sistema, he speaks a broader truth in relation to ESO, which is the difficulty of conveying what ESO is to people. Said Phil:

> Honestly, they [Trinity representative] still tell me today, "We really had no idea what that [providing physical space for ESO] meant. We just knew that someone -- we were excited about opening it up. We didn't know what that meant. Facility wise, we didn't really know what that meant, how many kids that really was going to be" because they didn't know, right?

Is it a school or an after-school program? What does a nonprofit with a social mission of transformation through music look like? Pastor Greenwald's quote is telling. Trinity was willing to participate in ESO despite a lack of clarity and many uncertainties, such as the number of students to be served by ESO, the curriculum, the time of day the space would be needed, the potential need for renovations, janitorial services, and a host of other logistical factors. Though the details were not set, Trinity was on board.

For the sake of clarity, I refer to the working group of Cathy Busey (founder), Dean Mark Parker (OCU), and Phil Greenwald (St. Luke's) as the Search Team. It should be noted this is not how they referred to themselves. Given the numerous boards and committees present in my data, this term separates them as a unique entity. It is also consistent with what they did, which is search. They conducted a search for an executive director, a site, speakers for a conference on El Sistema, and access to recruit children in OKCPS. In this section, I examine these early actions. Collectively and individually, they studied and researched El Sistema with the goal of understanding how its philosophy and aim fit within the context of Oklahoma City.

After Cathy returned from Los Angeles and received initial interest from Dr. Long at St. Luke's, the search team began to meet regularly to cobble together a plan. Pastor Phil explained:

> In some ways it was so clear whether we understood the mission of El Sistema. In other ways it was so vague because we don't really have a handle on how we translate that into our context. And so we began to push a little bit in terms of how do we do this. But we realized pretty quickly we wanted to go beyond our own expertise to look for some help.

This comment speaks to the importance of having a model or prototype that Dean Parker noted when speaking to Cathy. The trio sought external sources of information on El Sistema, including from El Sistema USA. Early on, however, there was an uncertainty about how El Sistema as a philosophy may translate to the local community.

The early stages of this case serve to demonstrate Weick's (1976) conception of loose coupling from a much different organizational structure than that of the PK-12 school site, which I examined earlier. Unprompted during my interview, Pastor Greenwald notes "So, early on it was pretty loose organization, we would meet here [St. Luke's] or at OCU. We didn't create a formal structure until we were kind of into that process." Given their positions as Dean of the School of Music (Mark) and Operations Pastor (Phil) both possessed considered capital and autonomy. Still, both were provided incredible flexibility in innovating early stage steps of ESO.

Shortly after they began their meetings, the Search Team set a loose, working agenda. Their first action was to begin the search for an executive director. They reached out to the El Sistema New England Conservatory, which publishes a host of information of El Sistema International and USA. Phil recalled, "So we looked around and started finding who are the people who know how to do this." For five years, 2009-

2014, the Conservatory graduated classes of promising conductors trained in the El Sistema philosophy, which are collectively referred to as the Sistema Fellows. There are approximately 35 such fellows. Knowing that a conductor experienced with El Sistema was preferable, they placed a job posting noting St. Luke's as the employer of record. Unfortunately, they did not receive a response. According to Cathy:

> I think this is because, in part, it was touted as a church position at St. Luke's. So if you had anyone deeply passionate about music they may have not been about the church. We sat down with Mark and asked how can we change this? Mark said well we could change it to OCU and make the person an adjunct professor at OCU and they could teach a course on El Sistema or social change in music in education. Maybe adding the university piece could help. The posting was out there for a few weeks and then we changed the posting and then we got a bunch of responses from all over the world.

Dean Parker's ability to express capital by posting the position through OCU was a huge factor in the early successes of ESO. In nearly all cases, a Dean providing resources at this level would simply not be possible. From Cathy's perspective, altering the position from St. Luke's to OCU seemed like a straightforward process. That being said, she understands the gravity of it. She stated, "It was a pivotal moment to have the university commit to doing this." It is also important to note that the initial idea was to hire the executive director through St. Luke's. As we will see later, what seems to be a subtle change of Mark suggesting to switch by offering to post the position from St. Luke's to OCU changes the trajectory of OCU's role with ESO.

Dean Parker's philosophy of community engagement. Initially, I noted the alteration in this job posting as a unique example of Dean Parker leveraging the social capital of OCU, but as I became immersed in the case I found there was a deeper issue at play. I came to understand and appreciate Dean Parker's philosophy of the Wanda L. Bass School of Music's civic responsibility to promote arts in the local community. This

commitment is also consistent within OCU's philosophy of engaging the broader community. According to Dean Parker:

> We're not going to do it [create an appreciation of the arts] with just that narrow range 18-21 years old – you can't make change that way. It's been a very strong philosophical commitment that we're here to serve the arts, and any educational activity within the arts that we can help with, we want to do it.

Taking it a step further, he stated: "That's [Community involvement] really our mission. Not to be just a college campus but to really be a cultural asset to the community in that way. Over 1500 non-college users access the current Fine Arts Building weekly."

It is this mentality of community outreach that helped give rise to the Wanda L. Bass's School of Music's involvement with ESO. This vision of community responsibility is consistent with that of Benson, Harkavay, and Puckett (2007), who appeal to higher education institutions' moral conscience on the importance of civic engagement. They maintain that in the current state of society, higher education institutions are uniquely positioned to be conduits of Dewey's vision of civil society and public discourse through the engagement of the local community.

A further testament to OCU's commitment to community is that it places significant value on service by factoring it into tenure and promotion tracks for many faculty. Dr. Parker has been Dean of the Wanda L. Bass School of Music for 21 years. Today, the school has a formal partnership with most organizations (private and nonprofit) with which it works, but this was not always the case. He stated, "When I first got here, there was a lot of conflicts about outside groups and outside folks. The mentality was we shouldn't have any time for them. I thought that's not the way it's going to be. We're going to actually do more." And more they have done. Regarding partnerships, the school of music has adopted a policy of seeking to enact public-private

partnerships with community organizations, which vary widely. And, in some cases, faculty salaries have been shared between the school and outside organizations.

Clearly, OCU has enacted a vision to bring the arts to the broader community. This case, however, provided an opportunity for the Wanda L. Bass School of Music to further crystalize that vision. While the Buseys were on board to bring financial capital to fund the program, it appears Dean Parker was willing to commit any and all capital at his disposal. According to him:

> It [provision of resources] was really whatever needed to be done. All resources at the ready. Space, instrument, music, dance, whatever we needed to write [into the program]. As we estimate or purchase, put them in our inventory system that already existed. Just really opening the door and saying "Whatever we need, take it off the shelf."

As Dean, Dr. Parker was fostering a carte blanche-like attitude to offer any and all things available to ensure that that ESO could take root. This demonstrates the importance of having individuals having both political capital and resources. It is not the fact that he is on board that is so startling, but the degree to which he committed to see ESO succed. He seemed to be literally willing to go to bat for the program no matter the costs. His track record as Dean affords him this opportunity.

While OCU has a long commitment of developing and supporting arts programs in the community, it appears ESO took on a deeper meaning from the outset. It is important to attempt to understand why this cause at this time resonated so much with Dean Parker. A contributing fact may be his previous experiences around school reform. He referenced this when recalling early discussions with the Buseys,

> Part of that came from my experience with A+ Schools. I was the first president of the Da Vinci Institute [A think tank for the Arts in Oklahoma] and A+ Schools. The idea about school reform

> came up, and we hired somebody to bring us all the models that were out there rather than start from scratch. And then we have the North Carolina A+ Schools. The rest was history. That was the right way to go at that time.

In the case of the A+ Schools, Dean Parker was willing to play the hand that was dealt to him and in many respects, the A+ movement is a success. He notes rhis instance is different than A+. Different model. Different goal. And, most important the ability to literally start from scratch. ESO was a unique in that it presented a rare opportunity to enact the founders' vision, which was consistent with the school of music's goal of affecting the lives of children outside that narrow band of 18-21 year olds.

"They Were Us, We Were Them." I will forgo my commitment to the temporal sequence in order to illustrate a critical point. My embeddedness within the site of ESO afforded a deep understanding of the case and day-to-day activities. In this instance, it allowed me to probe Dean Parker on a recent addition to the site. As I detail later, in year two, the board decides to begin the process of incorporation as a 501(c)(3) organization. I probe him on the logistics of in-kind donations to ESO work and he seems to gently indicate I am missing the bigger issue:

> **Researcher**: How about the most recent thing of OCU providing computers for El Sistema kids to create music? Dr. Raiber (ESO Music Director and Music Professor at OCU) noted that our college students aren't using these iMacs. You concurred and donated a few to ESO. Are those in kind donations?
>
> **Parker:** Mm-hm [no head movement and this appears to be more of no than yes, I think]. But again, that would be the normal nonprofit, but because El Sistema is OCU, it's not even a donation, because it's part of the building.

And, another quote from our interview: "They [the founders] were willing obviously to put a lot of money to buy stuff, but we actually had extra music stand racks in a storage

room. [I said] We shouldn't buy those. We have them. It was just the feeling that it was not helping another organization." Just a few minutes later, in this same interview, he underscores this point, "We were the organization. Whatever we had was part of what – they were us; we were them."

In many respects, Dean Parker saw ESO as an extension of the Wanda L. Bass School of Music. Over the course of the next three years, this manifests in a plethora of ways. To name a few: 1) the executive director and site coordinator (whom are both technically St. Luke's employees) will be provided office space in the school of music, 2) each semester ESO leadership will conduct professional development in the school of music classrooms, and 3) the school of music will send out ESO teaching faculty recruitment emails

Hiring of executive director. Based upon the positive response from the OCU posting, the Search Committee began the interview process. They conducted three phone interviews and agreed that two were viable candidates. The first was Jose Luis Estrada, an El Sistema Fellow, and the second was, as one member of the Search Committee put it, a "lady from Canada" who "had the qualifications, but she would have been very rigid like BAG, GAB." This quote, while direct, speaks to a deeper desire of the committee to hire an executive director who was flexible and had the potential to enact what was at that time a fuzzy vision. At this time, the details of ESO are still very uncertain. For instance, the committee had yet to identify a means to recruit students into the program, a location, and staff.

The Committee flew Jose Luis to Oklahoma City on December 12, 2012 for a series of interviews, and he was hired in large part for his vision and understanding of

the El Sistema philosophy. According to one committee member, "thinking that [hiring him] would be kind of our way to learn the system and etcetera." Another adds, "we were very impressed and thought that he had what we needed and could be the face of our organization." So the offer was extended to him and he came to work as an employee of Saint Luke's and as an adjunct professor at OCU in January. The committee would come to rely upon Jose Luis to bring the vision of El Sistema to life. Quickly, however, they realized there were a chilling number of logistical pieces to put into place, namely developing in-roads with OKCPS and identifying staff.

A new game in town: El Sistema Symposium. On April 13th, OCU and St. Luke's hosted a half-day symposium titled "El Sistema: Music Transforms." Symposiums are effective tools to facilitate discourse around community planning on social issues (Wates, 2014). An examination of the flyer that was sent out the community provides evidence of how the Search Committee was seeking to frame El Sistema as a national movement and ESO to the local community. In this section, I analyze the flyer as an artifact of how ESO, and its new director, sought to frame the program. Thus, I treat the symposium as a means to help introduce the game to the community.

The lead-in on the flyer focuses on the social mission of El Sistema and recognizes it as "a potent force for building a prosperous future in the United States and beyond." Certainly, this broad statement lends itself to several interpretations. In terms of this research, I contend this statement, which precedes the heading "Music Transforms" is an intention to bring focus to the social mission or transformative power of music education.

In my assessment, this symposium sought to achieve several goals. First and foremost, the goal was to announce El Sistema Oklahoma to the local community. But, in order to do this effectively, participants of the symposium needed to understand El Sistema as a philosophy and social change agent. Only then could participants understand the significance of an El Sistema-inspired program coming to Oklahoma City.

The second goal was messaging, which is a recurrent theme in the case, as this becomes a primary focus in year three of the program. Messaging and public relations are important elements for any nonprofit organization (Gardner, Seltzer, Phillips, and Page, 2014). Certainly, in these early stages ESO was attempting to articulate its message of being a program of social change to the community. It provides details of the other keynote lectures, including Jamie Bernstein, an advocate of El Sistema, who would later come to direct *Crescendo!: The Power of Music*, an in-depth documentary of children who participate in El Sistema-inspired programs.

Jose Luis's lecture focused on the praxis or action of El Sistema as a philosophy and the power of music for social change. The next two lecturers are directors of two of the most prominent El Sistema-inspired programs in the U.S. Ms. Witkowski discussed the process of implementing El Sistema in Los Angeles and Mr. Thompson focused on the capacity of music to uplift children in the program. One can reasonably draw the following message from the agenda: El Sistema is a unique social program aimed to improve the lives of children through the experience of orchestral music education.

Critical ethnography, a subset of ethnographic research, trains the researcher to examine subtle pieces of information. McCabe and Holmes (2014), for example,

examine the use of language, physical location, and institutional rules in exploring nurses providing sexual education to adolescents with developmental disorders. Even though I was not present at this event, analysis of this artifact allows me to extract significant meaning from subtle cues. For instance, the event is co-sponsored by St. Luke's and The Wanda L. Bass School of Music. In addition, it occurred at OCU. Here, we can see OCU leveraging its role as a purveyor of the arts in the local community. By hosting the event, the school of music signifies its approval of the program.

Up to this point, ESO had hired their executive director, engaged with OKCPS and the Oklahoma City Public School Foundation, and had developed their board. It is safe to say they had achieved a clear sense of who they felt would be their biggest advocates in the community. I contend those advocates are the target audience listed on the flyer: musicians, educators, and community leaders.

The symposium flyer stated, "the symposium is open to the public and encourages participation of educator, musicians, and community leaders. Registration is free and includes lunch." For me, this brings to mind inquiry, which is a central notion of a Deweyian public. He strongly advocated for discourse and viewed inquiry as a form of communal problem-solving. The use of participation hints at his view of inquiry. This is corroborated through an interview. Robyn, representing the OKCPS Foundation, and Dr. Mike Raiber, who would soon come to be the Director of Teacher Support and OCU Professor of Music Education, were present.

There was a wide range of individuals present, including non-musicians and individuals who were members at St. Luke's. Robyn noted:

> Mike and I sat at a table with Marcy. She just showed up. She was a St. Luke's person. She was the only person who didn't

> know someone at our table. She made sure to introduce herself to everyone before the day was over. She talked to everyone. She insisted that she wanted to be part of this and she meant it. Usually a volunteer, you're like hah. She really meant it.

Prior to this symposium, Marcy had no connection to El Sistema; she was not an educator, musician, or community leader. She was, however a member of St. Luke's. Once she heard the message of El Sistema and the aims of ESO, she committed on the spot. Robyn's interview also hints at what could be a high level of engagement and discourse, at her table at least. At the conclusion, academic years two and three, ESO leadership would come to hold Volunteer Receptions at St. Luke's as a way to thank volunteers for their dedication of time and resources to ESO. To Robyn's point, Marcy actually did become an active volunteer at ESO. Marcy would come to represent Dewey's version of the public by interacting with students, and even perhaps teaching staff or leadership, thereby enacting democracy.

The community had, in fact, turned out, signaling an interest in El Sistema. When reflecting on this event, Dean Parker added, "there was a bigger turnout than we anticipated with about 100 participants." One could reasonably infer there was excitement in the air. The event hit the mark by creating a buzz around El Sistema. The next steps were to engage actors in the local community and see if they are willing to commit resources to participate in the game of ESO.

Identifying the Players

With the quick hire of Jose Luis as executive director, the Search Committee moved on to getting local actors on board. Each member of the committee (Cathy, Mark, and Phil Greenwald) had their own networks, so it made sense for them to divide and conquer that numerous tasks before them. (Phil Busey, for his part, let Cathy

represent his interests while he focused on activities at his company.) In this section, I recount the committee's efforts to engage local actors by highlighting key interactions within the ecology of the local community.

Holding the cards: OKCPS. In this section, I extend the EPM by considering OKCPS as a player that is literally holding the cards. In this usage, cards represent children in public schools who are would-be participants. To be clear, my intent is not to imply children are game pieces or tokens for a game. I have already noted how Phil and Cathy brought OKCPS (Carl Springer and Susan Gabbard) to the table by laying out the game of orchestral music they intended to set in motion. Carl and Susan agreed to initial terms; however, key details still needed to be worked out. In this section, I discuss three of these details: identification of students, recruitment, and transportation from the school site to ESO. I also note the unlikely manner in which the OKCPS Foundation became involved in the case.

Also within this section, I discuss the Search Committee's processes on rounding out site leadership by hiring two additional staff members, one of whom filled the newly-created position of the Busey Chair of Music Education, a shared time faculty position between OCU and ESO. I detail the process of how this came to be and discuss its supreme significance to dramatically alter the conception of the case. The other is a site coordinator. In this hiring, I examine her background in social work as evidence of ESO bringing vision to the social mission of ESO. I also discuss the early significance of the OKCPS Foundation. In particular, I examine the role of Robyn Hilger, who would later become the second Executive Director of ESO.

To be clear, this section is all about the local players of the game and how their lived experiences, values, and social networks came to shape ESO. Of these players OKCPS stands unique in that it is an institution. People don't interact with monolithic institutions; instead, they interact with people who represent institutional ethoses and values. Thus, I convey the initial interactions between site principals, the then-fine arts director, and ESO leadership.

OKCPS Foundation: An unlikely playing partner. The OKCPS Foundation plays an interesting role in this case. As discussed in chapter four, it is not uncommon for foundations to routinely change strategies to support PK-12 schools. This is part of the political reality of the situation. As ESO was beginning to take shape the OCKPS Foundation had adopted the following strategies: meeting teacher needs, competitive edge grants, supporting national board certifications in the district, and maintaining a teachers' warehouse for supplies. Thus, from a policy perspective, it would appear the foundation could not play a role in ESO, but that would not be the case.

The foundation became engaged with ESO through a personal relationship. Robyn had recently transitioned from the classroom to the foundation. Given her background, passion for music education, and new role at the foundation, Dean Parker envisioned that she could play a role with ESO. He notes:

> Because Robyn was very interested in the idea and the mission, and she's a partnership kind of person, too. She wanted to see how she was going to benefit Oklahoma City public school children. She thought the foundation could and should be involved. It evolved into a temporary formal partnership. It didn't last real long.

Dean Parker had a relationship with Robyn and was aware that she had left the classroom just the year before Robyn had graduate summa cum laude from Oklahoma

City University, her bachelor's degree in Instrumental Music Education in 1999. She was recognized as the OKPCS District Teacher of the Year (ToY) in 2005 and Oklahoma (ToY) in 2006..In effect, she was in a transition and trying to affect change at the foundation.

As an astute surveyor of landscapes, Dean Parker surely had an idea that Robyn's role could potentially develop beyond advocate status into something else but at that time it was still unclear. In a very true sense, he bet on the fact that Robyn would become interested in ESO. Given her passion to teach, and budding interest in administration (just two years before, she had completed a Master's Degree in School Administration), this would prove to be a sound bet.

Facilitating a meeting with Cathy and Robyn was a central element to this plan. Dean Parker arranged a lunch meeting with the two. At this point, Cathy already trusted Dean Parker's judgment, thereby cementing the idea that potentially partnering with Robyn through the foundation was a good idea. As she tells it, "If Mark Parker calls you and says let's go to lunch, you know that you better go to lunch." In this instance, Dr. Parker sought to introduce Robyn Hilger to Cathy. Said Cathy, "She was the state teacher of the year. She's with the foundation. She knows Oklahoma City public schools inside and out and oh, by the way, she knows Mark Parker and et cetera, et cetera. It was like this is meant to be."

Cathy also found the two shared a personal connection. Robyn's mentor, Kathleen Reynolds, was also Cathy's music teacher and later referred students to Cathy when she was a piano teacher in the 1980s. This further established this relationship. Cathy notes, "To me, those kinds of coincidences are kind of God winks. To pull those

people together in those things and so here was Robyn." Clearly, the two hit it off. When reflecting back on the early factors that gave rise to ESO, Cathy frequently references her Christian worldview. For her, these are not causal circumstances but something more. This also permeates board meetings, which occur at St. Luke's. It is important to note the religious values that direct decisions, as well as site operations. I pick up on this latter point in the section "The Social Mission of Music."

This interaction also illustrates the importance of social capital, i.e. networks between actors. Cathy's endorsement of Robyn's involvement and Robyn's interest prompted Dean Parker to engage with Lori Dickinson, the Executive Director of the OKCPS Foundation. I asked Dean Parker how the partnership with the foundation became formalized. He states: "In the conversations with Lori at the foundation of how can we lean on Robyn's expertise? How can the foundation support this new idea that's going to help 100 Oklahoma City public school kids? We could work out arrangements…"

Though Dean Parker does not elaborate on what he means by Robyn's expertise, he likely referring to those qualities that made her teacher of the year, her extensive knowledge and far-ranging networks within the OKCPS district, knowledge of public schools including its limitations in regards to funding the arts, and first-hand knowledge of seeing defunding towards the arts.

An agreement was struck that one quarter of Robyn's time at the foundation would devoted to El Sistema. Regarding Robyn's initial perceptions of El Sistema from that lunch meeting, Cathy notes: "This is tied at her heart so much that if they don't find a way to work this out in partnership, Robyn is probably going to leave the foundation

because she is that excited about El Sistema that I think she'll go that direction eventually."

The significance of the foundation and Robyn's involvement cannot be overstated. While ESO had already received the blessing of the OCKPS Superintendent and the Fine Arts director was working to identify school sites, this partnership served to up the ante, in terms of resources in a host of ways. This is especially important as ESO was nascent and just taking shape. Cathy recalls:

> This person [Robyn], I think she could do something with us. I remember telling him [Jose Luis], I think that I found somebody that's going to work with us because he was thinking he was going to go hire an operations person…I think Jose has this concept like it's [ESO's] going to be this huge organization. Well, that's really hard to do when you're first starting out. I think Robyn added a lot of dynamics to that and practical experience.

At this point, there were many uncertainties including budget and roles. Evidently, the ESO board and Jose Luis had yet to work out how site operations would occur and how this would relate to personnel. In essence, Robyn would come to handle the operations side of ESO, as it relates to involvement with OKCPS. This would prove to be a huge piece of the partnership. As we will come to see in the development of the case, Robyn becomes one of the most significant players in the game of orchestral music education.

Loose coupling, as it relates to OKCPS Foundation. The involvement of the OCKPS Foundation also demonstrates the role of loose coupling, albeit from a much different perspective than that of OKCPS. Nonprofit organizations are often desirable partners for highly bureaucratized organizations like public schools, as they allow for innovative solutions and nimbleness in addressing concerns (Light, 1998). This is due in part to their loose coupling, which is manifested in lack of bureaucracy, or less red tape, if you

will. Further, they are a particular means for actors to realize need through community action that cannot be achieved in tightly coupled systems.

A common criticism of schools is that they lack proper leadership opportunities for highly effective teachers (Hargreaves, 1994). Often, districts embrace some form of an institutionalized teacher-mentoring program (Rowley, 1999) in order to provide such opportunities. To this point, Rhonda Taylor, current OKCPS Fine Arts Director, had recently attempted to provide such roles specific to teachers in the fine arts. She stated, "Team leaders primarily oversee the all city events, any district events, curriculum issues. We started in June." This program came well after Robyn's departure to the foundation and then ESO.

In this instance, we see that Robyn (no doubt an expert music teacher) becomes afforded the opportunity to devote 25% of her working day towards as of yet undefined operations with ESO. This level of autonomy is unheard of! From her perspective, she has been provided a once in a lifetime opportunity to shape an alternative form of education that has yet to develop its curriculum and is not hampered by budget concerns that plague PK-12 education.

It is also important that note the leap of faith she took. At this point, all Robyn does know is that she will be an integral part of developing successful partnerships with schools so it was a leap of faith. Flashing forward, we can find evidence to this point, when I first met her, as noted in "Orientation to the School," Robyn said, "When forces act you, you move." Given her backstory, this quote is especially profound.

Although it seems the OKCPS Foundation had strategic guidelines that would prohibit their involvement in ESO, evidently they were negotiable, at least in this case.

Here, we see the impact loose organization within the structure of foundation. Lori, the executive director, was provided significant autonomy in resource allocation, such as Robyn's time to this emergent form of education. The involvement of the OKCPS Foundation demonstrates that public school foundations, when loosely coupled may be well-positioned to address perceived need and innovate new solutions due in conjunction with PK-12 schools.

Also, not to be lost in this instance is the importance of capital. The actors setting the stage for ESO have significant political clout in the community and OKCPS. To this point, Dean Parker was willing to exert a significant amount of his capital and networking to ensure that ESO had every opportunity to succeed. In this instance, he had earned Cathy's trust and enacted the vision that Robyn would bring indispensable skills toward the operations of ESO.

A deeper examination of his appeal to Lori Dickinson is telling. He asked, "How can the foundation support this new idea that's going to help 100 Oklahoma City public school kids?" I would argue this appeal is multi-level in that includes elements of ethos (ethics), logos (logic), as well as paths (emotion). My interpretation is that this brief appeal addresses all three elements, respectively. He is saying something to the effect of, "Hey, this is great idea; we are all on the same page to help kids," "This is no small matter. We have the opportunity to directly effect 100 kids!" And, "let's find a way to make this work"

Cathy astutely summarizes the importance of timing and the strategy to engage the foundation strategy. She noted, "There again…it was the people involved because I think if you have the people that are at the foundation now, that would have never

happened." By referring to the now, she notes strategies of the foundation have dramatically changed since 2014.

Today, the foundation has recently undergone a change in leadership and strategy. One of its current focuses is on developing long-term partnerships in the community, particularly through corporations. During my interview with him, Dean Parker paused to reflect on the significance of the foundation's role. He stated, "It evolved into a temporary formal partnership. It didn't last real long." In upcoming sections, I discuss the rapid changes that would soon unfold.

Getting schools on board. As Dean Parker and Pastor Greenwald were handling logistics and lobbying for ESO at the institutional-levels, Cathy worked in earnest on formalizing processes with OKCPS. The earlier meeting she had with the Superintendent and Fine arts Director secured buy-in and now was the time to sort out the details. In this subsection, I highlight two key events that occurred with OKCPS prior to the first day of ESO. First, I discuss a meeting in which Cathy, Dean Parker, and Jose Luis met with representatives from OKCPS to lay out a more detailed vision of ESO that included the number of students to be served. Second, I discuss the importance of negotiating transportation from the school sites to ESO.

Susan Gabbard, then-Fine Arts Director, worked with Robyn at OKCPS Foundation to identify which schools would be best served by ESO. Both Susan and Robyn, representing the foundation, were deeply embedded in the district. Consistent with the social mission of ESO, they worked to identify children and families that lacked opportunities in music education and were in relative need of transformative opportunities. Susan stated: "The principals had to look at their student lists because I

am sure they wanted to send some of their best kids, but we didn't necessarily want the best kids. But we wanted the kids that needed elevating in terms of lots of things." This quote speaks to the efforts to educate principals towards the mission of ESO. Ultimately, eight school sites were identified based upon lack of music education opportunities and geographic location. Consistent with the vision of El Sistema as philosophy, the eight school districts were all high need schools, as evidence in Table 10.

School Site	School Enroll-ment	ESO Enroll-ment	F/R Lunch %	Mobility %	ELL %	Primary Ethnicity	Secondary Ethnicity
Cleveland	360	12	54	21	19	50% White	27% Hispanic
Gatewood	277	8	92	50	35	28% Hispanic	24% Black
Kaiser	597	21	90	34	40	50% Hispanic	27% White
Linwood	419	15	94	29	50	67% Hispanic	14% White
Putnam Hiegths	339	12	99	41	30	30% Hispanic	29% Black
Sequoayh	390	14	89	30	38	42% Hispanic	27% White
Eugene Field	538	19	100	36	48	65% Hispanic	19% Black

Table 10: ESO Elementary School Site Characteristics (Year 1)

Throughout the interview process, many individuals noted that sites were selected solely by geographic region, but as Dean Parker noted, leadership and climate were also important factors. Insider knowledge of school sites, provided through Susan and Robyn, were critical in setting up ESO for success. To me, this highlights the centrality of insider knowledge. School climate is notoriously difficult to understand and quantify (Anderson, 1982; Stewart, 2003). Here, two insiders were able to vet and pre-select players that would be good playing partners.

Dean Parker noted that Robyn's insider information of school site climate was also a critical factor: "Proximity of where it is to campus, Robyn's help and input, the school's leadership and readiness to participate in something like that. She knew the personnel pretty well and said, "These people would get it [philosophy of ESO] and help and understand." Laura, site coordinator at ESO, also noted Robyn's involvement with student identification: "That [identification of school sites] was really a Robyn thing because she was at the foundation. She could identify which the collection of schools that would kind of pull the students that we're looking for or we could serve in the best way."

While there had been discussion on the number of children to serve, it was yet undetermined. This may be because service capacity hinged on several factors, such as size of the site, number of school districts served, and staffing. As these components gradually came into focus, there was increased clarity. Pastor Greenwald reflected broadly on the early decision-making processes of bringing the initial vision of ESO to life. He stated:

> You know, I think early on we had the idea that maybe there would be a new orchestra each year and that whatever the number of children was you have an orchestra and then that orchestra would be in relationship with each successive year but then maybe that would go right on through until high school.

In relation to the ecological-political metaphor, this demonstrates that while the process was not highly formalized, e.g., not based upon a strategic plan, there was a shared vision. It is likely that this vision provided a point of unification between the Buseys, Dean Parker, and Pastor Greenwald. The founders and working group shared this vision, thereby creating rules to the game of orchestral music education. And, while the

rules were purposefully loose, OCKPS and the foundation, OCU, and St. Luke's were duly convinced to invest resources towards ESO.

Now that the school sites were identified, it was time to determine how many children could be served and application processes. Dean Parker noted, "Jose Luis thought that [the number of 101] would capture people's imagination. He was very, very fixated on it….he thought it would show people that this is not a quintet or something." This quote hints at the importance of Jose Luis's training as an El Sistema Fellow. For him, tactical decisions such as the number of students served was very much about capturing the imagination of the community and demonstrating El Sistema as a social philosophy. This quote also speaks to Jose Luis's ability to harness imagination and convey the social mission of ESO, both of which were important early in the process of bringing the vision to life.

The thought processes regarding the number of students ESO would serve highlights another interesting factor, which is that there was no specific budget set forth for the first year of ESO. In my view, the Buseys' willingness to fund ESO and see it through for an uncertain number of years was tempered by their faith, which included being responsible financial stewards. This understanding helps explain the decision-making processes between what are seemingly-wide-ranging financial decisions. Two such examples that highlight this decision-making process are the establishment of the Busey Chair of Music Education and Robyn's role at the OKCPS Foundation.

Establishing the Busey Chair of Music Education and recruiting Dr. Raiber was a significant investment of financial capital. On the other end of the spectrum is the negotiation of Robyn's time handling operations with the OKCPS, which essentially

provided no financial cost to ESO. Thus, the freedom (and responsibility) of not having a specific budget allowed for decisions to be based not based solely on finances but on enacting the vision of how ESO could transform the lives of students and families.

Another chair at the table: The Busey Chair of Music Education. As discussed in the section "Researcher Positionality," during my six months of fieldwork and data collection, I became Director of Social Studies Education at a small, Christian, Liberal Arts University. As director, my principal task was to submit a social studies program report to Oklahoma Educational Quality and Accountability, the accrediting body of teacher preparation programs in the state of Oklahoma. Among other things, this included crash courses in National Council for Accreditation of Teacher Education (NCATE) and specialized professional standards (SPA) in social studies education. As a result, I was very much focused on issues surrounding standards, institutionalization, and teacher education. Indirectly, these issues tacitly informed my views of the case. All this is to say, I became attuned to the creation of the Busey Chair of Music Education, a subtle, yet extremely significant issue within the case.

As I first came to understand the case, I became aware of the aforementioned process of hiring Jose Luis, including Dean Parker's suggestion the posting be changed from St. Luke's to OCU. Within days, this elicited a response of three well-qualified conductors, which ultimately resulted in the hiring of Jose Luis. Perhaps, this event prompted Dean Parker to consider how El Sistema related to the broader goals of the school of music. Witness this exchange from Cathy and I:

> **Researcher:** Tell me about Mike Raiber [Director of Teacher Support, ESO]. How did you come to know him?

> **Cathy:** There again, Mark [Dean Parker]. Mark said there was a -- OU [University of Oklahoma] that is really good professor with music education. I think this is something he would have a heart for this [ESO] because he has done a stint with an inner city school. He said let's go to lunch with him and talk about what that might look like. I think Mark at the time was looking for how could he use El Sistema to then further enhance the school of music and specifically music education.

Clearly, this is after Jose Luis was hired (December of 2012). It is also after formalized discussions with the foundations. Cathy continued:

> We took Mike [Raiber] to lunch like we took Robyn to lunch and [he] just explained he knew about El Sistema. He had done his own reading and through the music circles and the education circles had heard about it. And so we just said we're thinking about this in Oklahoma City and we have got this guy hired but we're going to need more than just Jose Luis. So he'd say I'd be really interested. So Mark put together, that was in the spring or early January, February.

This interview excerpt is rich in data. Again, we see Dean Parker acting as a connector by bringing Cathy together with Dean Parker, just as he did with Robyn. According to Cathy's view, Dean Parker had a vision to link El Sistema and OCU. This could be related to their shared social mission and guiding principle of music as an agent of transformative change.

Much like the initial conversation with Robyn, there was not a clear understanding of the role Dr. Raiber would occupy. The first step for Dean Parker and Cathy was to feel out Mike and determine if this was something he may interested in. According to Mike, Robyn made the initial phone call, as she had a personal relationship with him. He stated,

> Robyn gave me a call….she knew that kind of things that I'm interested in and this El Sistema thing would be of interest to me. So she called me and said that Mark Parker would want to talk to me about you know, some of these ideas and I said I would be more than happy to talk and bounce any ideas off to anybody to

> do that. So Mark gave me a call and we talked on the phone about the OCU position and about El Sistema in particular. I thought about it for a couple of weeks and I thought you know, what the heck it sounds very interesting.

Though Dean Parker knew of Dr. Raiber, we can assume their relationship was professional. Thus, he relied upon Robyn, who had a personal relationship, to make initial contact with Mike. Dr. Raiber has extensive experience in music education and was already on the tenure track, so even considering an alternative position is noteworthy.

At this time Dr. Raiber was an Associate Professor of Music Education at the University of Oklahoma. Prior to that appointment in 2000, he had also he taught public school in Missouri and Oklahoma for thirteen years and was the Associate Director of Bands at Oklahoma State University for three years. He was also the primary investigator on the collaborative research team for Oklahoma A+ Schools. Given his expansive resume, flipping Dr. Raiber to OCU and ESO would be a coup.

For Dr. Raiber, the social mission of El Sistema and possibility of making an impact intrigued him. As he stated,

> I had had a real desire while teaching here at OU about trying to find some ways that we could make greater impact on underserved populations in the area of education. That was a real attraction for me. You know, it's where I started my career. Basically I started teaching in Inner City High school in St. Louis with a fabulous teacher who you know made amazing things happen there. It had always been a real desire of mine to have some sort of impact into those areas.

In his experience as Dean, Dr. Parker has had several instances in creating Public Private Partnerships (PPPs), including time-sharing between OCU and other

organizations. By definition, successful partnerships take into account the needs of all effected, as well as environmental factors (Patrinos, Osorio, & Guáqueta, 2009).

Cathy and Dean Parker realized that adding Dr. Raiber was not only a significant commitment for ESO and OCU, but also for him. There was significant discussion on his roles and responsibilities. For both Dean Parker and Dr. Raiber, there was a deeper drive to restructure the music education program. Dr. Raiber stated, "up until that time there had not been a music education position on that campus. Music education [professional courses] had been spread over different faculty members." Ultimately, what OCU came to offer Dr. Raiber was a position that included a split between music education and ESO. Dean Parker noted, "Initially, it was a 50/50 position knowing that year one would be maybe more like 80/20." For his part, Dr. Raiber was flexible and open to new experiences and took a leap of faith, much like Robyn.

Affecting social change through altering music education. Dean Parker and Mike were in agreement that OCU's involvement with El Sistema provided a unique opportunity to re-envision the philosophy of music education from the ground up. Dr. Raiber stated:

> The charge was that I came in to say we need to develop a music ed program that is state of the art. Recognize the fact that that curriculum had not really changed since about 1950. We needed to develop a new curricular path to music education and be able to align that with the elements that are going on at El Sistema and to be honest that was the piece that really, really attracted me is I saw potential both of those to interact with each other. There's not another place that I know of that's doing that particularly in the other direction. And having the day-to-day connection between all of that you know, that's pretty powerful.

Clearly, the allure to come to OCU and ESO was an opportunity to synthesize his values, vision of service, teaching, research, and scholarship. Seemingly, he viewed this as an unparalleled opportunity to affect the lives of children at ESO, music education students at OCU, as well as the potential to inform the broader community through scholarship.

Though not as well-versed in approaches to music education, as an entrepreneur Cathy also recognized the potential to make significant institutional change. She stated:

> We were able to work out a scenario where Mike became the Busey Chair of Music Education at OCU. He then is coordinating the teacher resources and he's training the teachers how to teach in El Sistema. At the same time, he now has a music program at OCU where he has students in his program, in his classes, then go and they have a laboratory with El Sistema. They are required in some of the classes to give so many hours and this is a first year for that. We had to build that.

Cathy realized bringing Dr. Raiber on board resulted in a huge boon to ESO capacity and could provide the Wanda L. Bass School of Music an innovative means to put curricular teeth to enact a social pedagogy for music education. What came to be is a reciprocal interaction between OCU music education students and experiences on site at ESO. I will pick up on the theme, the Social Mission of Music.

I have come to appreciate that both Dean Parker and Cathy have a unique capacity to set forth a vision and provide candor. During my interview with her, I was curious. I asked Cathy if the idea of Mike's position was hers or Dean Parker's:

> **Researcher**: Was that part of Mark's vision, yours. Was it present from the onset?
>
> **Cathy**: Both ends because we realized that you have to continue to permeate the community with the ideas so that you can have faculty to draw on to build your program. There is both ends. You've got to create and you've got to then have sources for people to come into the program. Yeah, it was the both ends. I

> have the highest regard for him and I think a lot of times, we get credit for the El Sistema program because we put the dollars in, but Mark was—It could not have been done without Mark Parker.

It seems plausible that Cathy and Phil Buseys' lived experiences, which include times of being in financial straits may have influenced their perspective of creating ESO. When Phil had been willing to take risks in his career it "was always a joint decision [between him and Cathy]," Phil said. Having been his partner for so many years, Cathy was aware of the emotions and risks inherent in changing careers, especially later in life when things were stable. These views were evident as Cathy reflected on Mike's decision to come to OCU and ESO:

> So it didn't look like I would not have wanted to come to work for a university knowing that I only had one year pay. I wanted to give the comfort level there that no, this was going to be an ongoing support and you didn't need to worry. The money was going to be there, so each year, we continued to do that. There is always the year they're doing plus another year in the pot so to speak.

Throughout my limited experiences with her, I found that Cathy has an uncanny ability to put herself into the shoes of others. This is on display in her discussion to make what she felt was the necessary level of comfort for Mike to come to OCU. Hence, the Buseys committed to provide two years of funding for the Busey Chair in Music Education with the idea that it may require more.

The vision for the Busey Chair in Music Education was to advance a more robust and profound appreciation for music education. In some respects, ESO and its focus on the social mission could serve as a bridge to integrate social mission with music education. A Pastor Greenwald noted, "Mike's role with ESO would be Director of Teacher Support. The first task to this end would be to recruit music teaching

faculty." Fortunately, the school of music had a built in pool of music education majors. Over the course of the late spring into the summer Jose Luis and Mike worked to build teaching faculty and be ready for the first day of ESO, which was to come in September. In the meantime, ESO still had one more full-time position to fill, which is that of site coordinator.

Site coordinator: "This is about serving our families." Much like the other pieces of the puzzle that was becoming ESO, while there was desire for a site coordinator, this role was yet to be clearly defined. In yet another example of relational capital, through a mutual contact, Robyn knew of Laura Moon who had, at that time, worked for Calm Waters, a nonprofit, grief support and counseling center. Laura was a school facilitator who went into OKCPS public schools and ran school-based grief groups for children in elementary to early middle school. Her undergraduate degree is a BSW (bachelor's degree in social work). I consider the hiring of someone with her background and educational training in social work, as opposed to music education, management, or teaching as continued evidence of ESO's commitment to its social mission.

I asked Laura what about ESO appealed to her. She told me that while she is from a rural area in Oklahoma, she attended a magnet school only about 15 blocks from ESO. She also played violin until she was about fourteen. Regarding the latter, she noted it helped her believe she could accomplish other things. She also "liked the idea this was a partnership between university, foundation and church because I liked the idea that like I was saying it's serving the community." I found that Laura's comment on the appeal of the partnership was echoed in many of the informal interactions I experienced at the research site.

Not surprisingly, individuals had a hard time discerning the role of multiple partners represented by ESO. Some parents think of it is a nonprofit program housed in a church, and that proves to be true, but not until year three. For the first two years, ESO was operated as a ministry of St. Luke's, even though it operated at Trinity International. Many parents and guardians also understood the OCU connection since many of the teaching faculty are music education students in the Wanda L. Bass School of Music. Also evident in this quote is the appeal of ESO serving the community.

Laura's experiences with working within schools and directly with teachers influenced not only her work at El Sistema, but also ESO itself. This is amplified because it is a loosely coupled organization with only two full-time staff (her and the executive director), as well as Dr. Raiber. Laura has been afforded significant autonomy in her position of site coordinator. She manages all communication with parents/guardians, including newsletters and messaging of concerts and changes to ESO routine.

In a given day on site, Ms. Moon juggles a host of responsibilities including helping children homework, peer relations, fostering positive coping skills and emotional intelligence, and sometimes crisis management. She has so many roles, it is hard for people to understand exactly what she does. Humorously, she notes, "then I'm like, I would be really pissed at someone if someone called me secretary. I would be pissed." If any of the teaching faculty have problems with students, they are trained to deal with the problem, and if all else fails the child is sent to Laura.

Laura also communicates with school teachers, and while the executive director may confer with principals and music teachers, Laura does sometimes too. I asked how

her experiences of working within schools translates to working at El Sistema. Said Laura:

> I feel like it helped me for at least this position because I do have to communicate with schools a lot, just communicate with teachers a lot…. Like yesterday I was texting one of our Sequoia [elementary school] teachers. One of their kids was having a really tough so I was texting really hey, how was your day with xxxxx [student].

Surely, her varied experiences at Calm Waters contributed to her ability to multi-task, but another factor at play is that Laura has an outsider perspective on how schools work. In effect, since she has not been an employee of PK-12 schools she has not been socialized to what is and is not within the purview of schools. This is important because she is willing to do anything that relates to the social mission, including picking up children, and texting teachers or parents/guardians.

Identifying ESO music teaching faculty. Laura was hired in the summer of 2013. In order for El Sistema Oklahoma to meet its internal goal of beginning in the fall of that same year, staff had to act quickly. Much like the Search Team that worked to identify and hire them, they took the divide and conquer approach. Thankfully, as local music educators, Mike and Robyn had a built-in network to identify music teaching faculty. They, in conjunction with Jose Luis, also tapped Dean Parker to help recruit music education and performance majors at OCU. They also utilized their knowledge and networks to identify music teachers with outstanding reputations in the local community. Mike and Jose Luis conducted interviews with teaching faculty.

One such teacher is Samantha Sy, a former OCU school of music graduate who was teaching orchestra at Taft, an OKCPS middle school. She recalled, "[they] Asked all these questions about my educational beliefs and all of this. And then at the end of

the interview, I remember he said, 'By the way, I know who you are and you've been doing great things.'" This quote is telling because through the personal networks, institutional ties of OCU, and perhaps Mike's role as President of Oklahoma Music Educators Association, ESO was able to be selective in what qualities they most desired in staff.

Another teacher I interviewed was not hired until year two, but it is worthwhile to note how ESO site leadership had refined the hiring process based upon one year of experience. Said Solveg Hendrix, ESO teaching faculty member:

> I went into the interview. It was pretty funny because part of the requirements was you have to teach a lesson. It was just interesting dynamic of, okay, do you want me to teach a lesson as if your children? Do you want me to teach you about dynamics or am I supposed to teach you something? They said you pick! [Laughing]

Apparently, in year two Dr. Raiber (who was involved in both interviews) and other ESO site leaders had a clearer understanding of what additional skills may translate to effectively teaching kids at ESO. This also hints at a process of continual improvement, which I found to be the evident at ESO.

Recruitment getting the word out to principals. In my view, recruitment into schools is an important step in the formation of ESO because, as the first formal contact to school sites, it gives us insight into the messaging of the social mission of ESO. Although, the six identified school site principals were aware of ESO they did not have a good understanding of its vision for the community and children in their schools.

An initial letter that outlined ESO and the profile of students it was seeking to serve as sent out to pre-selected school sites. According to Susan Gabbard, then-Fine Arts Director:

> Paperwork was sent out. You know this was critical to get people. Find kids who were average to even struggling academic. Kids who needed turnaround in their behavior and parental support. There were they three criteria. I think the principals talked to the music teachers. You know a lot of time the fine arts people get left out, and they shouldn't because they see every child in the school.

Susan relayed the three criteria by which school site principals were directed to identify children. They were looking for students who 1) were struggling to average academically, 2) were in need of turnaround behavior, 3) and had strong parental/guardian support. This last piece was critical, as ESO leadership sought to develop strong bonds with families and believed this indicator would contribute to increased retention and less attrition. Another important criteria, although not mentioned by Susan, is that no previous musical experience was required.

Once the school sites were identified and received the initial notification letter, an informational meeting was held at the Wanda L. Bas School of Music. School site principals were invited to attend and meet with Cathy, Dean Parker, Mike, and Jose Luis to learn more about the El Sistema philosophy and logistics of ESO. One principal noted Cathy's excitement, "I remember, Mrs. Busey. She was very excited about it. And apparently she had heard about the program and so it sounded to me like she had organized it."

I asked the principal what she recalled most about the meeting and she reflected on Jose Luis's vision for children who would participate in ESO. She said:

> I still remember. It just put it in perspective. It [El Sistema] brings pride and they are more comfortable going. You build the pride and you bring the connection into the school with these parents who wouldn't naturally be comfortable coming in to the school.

Her recollection speaks to Jose Luis's framing of ESO through its social mission. This was not pitched as a music education program, but rather a program to develop the whole child. Furthermore, Jose Luis was appealing to school sites by referencing the potential of increased student engagement.

Building school connection and ensuring that families were well-informed about ESO were important from the outset. Although I am not sure of the frequency, at least one time Jose Luis went to the school site to visit with parents to host a question and answer meeting. A principal tells me about a vivid interaction she witnessed:

> I remember that Jose Louis came. They [Parents] could come out and ask questions and there was a mother that was concerned about it because it was every day after school and he came in my office and sat down with her and spoke Spanish with her and talked about how it [ESO] started…The mother was put at ease and it was fine and he really make her feel comfortable with it and that helped that he spoke Spanish. Because I had quite a population of Hispanic parents there so I remember that as being the good thing that he was willing to come and talk to any parents who wanted more information.

This is yet another piece of evidence of Jose Luis's ability to inspire vision. The population that would come to be served by ESO includes several Spanish speaking families, ELL students, and students from other minorities (refer to Table 10). The fact that Jose Luis was able to connect with parents in their native language certainly was value added. This quote also provides insight into one of the ways that ESO was able to build trust with school sites. This would prove to be a critical piece in the successful implementation and growth of ESO over the course of the next three years and beyond.

I had one revelation during my interview with this school principal. As previously mentioned, school sites were pre-selected for ESO. I assumed that pre-selection implied a mutual process between district level administrators and school site administrators, i.e. principals. Which is to say, I assumed principals accepted whether or

not to participate in the program. However, apparently, that was not the case. From my interview transcript:

> **Interviewer:** Going into that meeting [principal meeting at OCU] have you decided that you were ultimately going to do the program or were you unsure?
>
> **Principal:** I don't remember having an idea that I had an option probably. I think it was kind of decided for us. Were not provided an option. So and that was fine. You're invited to do this was the message. So we expect you to do it, and to me that's all right it was a good program.

From the principal's perspective, she or he was not too concerned with the lack of autonomy in deciding if ESO is a good fit for her school. For me, this is a dual issue of power and politics. The Buseys had significant power within the superintendent's office. Once the school sites were identified, they had no say in the process. Due to power and politics at play, this was a district-level decision.

One could view this as diminishing the role of the principal, which is especially relevant in a school choice district. In my research, two interviewees noted there are district-approved after school programs. I sought a district-level meeting to clarify this, but was unable to secure such a meeting. Though it is beyond the scope of this research, it would be interesting to note the balance between district and site-level decision making in regards to after school programs.

Securing transportation. With Trinity secured as the program delivery site and the process of recruiting students in full swing the next step was to determine how transportation from the school sites to ESO would work. In June, Robyn went to meet with Scott Lane, Director of Transportation for OKCPS. I asked Mr. Lane if that was his very first contact with ESO. He responded, "They [OKPCS Administration] told me

about it beforehand so I knew about it [the program]. I knew it was something they wanted to have done. So, it was like Scott work it out." It appears Mr. Lane's experience was very much like that of OKCPS principals in that the district had decided that OKCPS buses would be providing transportation.

At this point, ESO has developed a good working relationship with transportation services. ESO pays for bussing and is invoiced like any other program that is outside the purview of the general fund. Bussing is provided daily from school sites to ESO. In addition, bussing would be available for concerts and other activities, as needed. Mr. Lane also notes, "The superintendent at that time Mr. Springer was all for it, so was Mr. Lopez, and now Mr. Neu [superintendent at time of interview]." Thus, despite frequent turnover in this position, ESO has remained in good standing.

A key takeaway: Local actors matter. A key takeaway from this case is that local actors matter. As previously noted, OCU and St. Luke's provided institutional credibility for ESO. Their capital was central elements in securing commitments from OKCPS, the OKCPS Foundation, and Trinity. While this most certainly affected school sites to some degree, one consistent theme that emerged during my interviews was that individual school sites indicated positive experiences with the people at ESO. Furthermore, each ESO staff member that interacted with school site personnel affected them differently.

While Jose Luis was charismatic and visionary, it was Robyn and Dr. Raiber who had pronounced credibility, which I interpret to be based on their credibility with the local community. At the information meeting at OCU, principals were provided a magazine article or something similar featuring Jose Luis and that appeared to convey

some significance to a principal, but not as much as the reputations of Mike and Robyn. Later in the interview with that same principal, I ask about Robyn:

> **Researcher:** How long have you known Robyn?
>
> **School Site Music Teacher:** Oh gosh! Several years back when she was teaching in Oklahoma City Schools at Bell Isle she was just one of these marvelous teachers and she was an All State Chair.

Then, I ask music teacher about Dr. Raiber. She replies, "Oh, he's big time." In my view, Both Robyn and Dr. Raiber's involvement in ESO provided instant credibility with both principals and music teachers both of which identified students for ESO. In the next section, I discuss an event that occurred shortly after ESO had begun operations.

New rules: A change in Leadership.

During interviews, one of the questions I asked was, "Can you tell me about maybe two or three really critical moments or challenges that ESO has faced?" I conducted 16 formal interviews. There was only one moment that was expressed across all interviews, which was on Jose Luis's departure as executive director. This could be referred to as a critical incident. Examining such incidents can provide particular insight into organizational processes and fidelity to mission (Chell, 1998). Due to its salience and its impact on the trajectory of ESO, I analyze this event in relation to the EPM.

Jose Luis left ESO about halfway through its first year of operations. His departure was sudden. In fact, Robyn noted, "We got the call that Jose Luis was leaving ESO the second week of December 2013...we were just off the concert. We were told was that he was moving on to other projects."

The transition would require healing that would take time. According to a board member, “He was loved and adored by Saint Luke's church. He was the face of the organization, had a wonderful relationship with [Pastors] Bob Long and Phil Greenwald. They had taken him under their wing. He has this magnanimous personality.” Her comment and view by St. Luke’s speaks to the fact that in many respects Jose Luis was the face of ESO to the community, including OKCPS and families. His departure was not taken lightly. To complicate matters, there was disagreement on his departure. As one individual put it: “First of all, the emotions to heal from that within the group of us because XXXXX and XXXXX and XXXXX and I were on one camp and XXXXX and XXXXX were on the other camp. So we had to heal from those wounds.” Despite some unrest, the board and leadership’s commitment to the mission of ESO overshadowed the shock of his departure.

Two possible explanations of Jose Luis’s departure through the EPM. As Executive Director, Jose Luis’s departure dramatically altered the rules of the game. In this sub-section, I consider two possible explanations of how his departure both of which are consistent with the EPM. Then, I discuss how ESO moved forward.

Jose Luis was frequently described as the face of El Sistema and by numerous accounts, and he was a charismatic leader. Riggio (2012) notes charismatic leaders are often noted for their ability to articulate a compelling or captivating vision, and are able to arouse strong emotions in followers.

Shamir and Howell (1999) note that charismatic leadership most frequently emerges and is most effective at early (entrepreneurial) stages of organizational growth. Rightly so, they also note that leaders can exhibit and enact different leadership styles.

As ESO had completed the vision stage, and was shifting to operations mode, this change in leadership may be attributable to the organizational need for a different leadership style.

Another viable explanation for Jose Luis's departure is the tension between the philosophy of El Sistema and the needs of the local community. Over time, this would come to be an ongoing factor throughout the case. In my view, Jose Luis's departure can be viewed as a microcosm to illustrate this. Reflecting back on early in the first year of ESO an individual reflected on a presentation Jose Luis gave the board. He or she states, "I mean yeah that's great it worked in Los Angeles, yeah that's great it worked in Massachusetts or worked in Venezuela. That's not how we can serve our families. That's not how we can serve them." This highlights a strong desire to serve the needs of the local community, as opposed to general approaches to problem-solving.

As an El Sistema Fellow, Jose Luis had a particular vision of what the program should look like. Once ESO began operations, there was a growing disconnection between the philosophy of El Sistema and philosophy of engagement with the local community. Laura, site coordinator, keenly observed:

> He was very passionate. Every time he spoke and you could see that he definitely had an artistic vision for El Sistema. I think helped them kind of have the very grand vision which was really helpful at the beginning …. Then it was about how can we make that work for Oklahoma City or how can we bring in other parts that haven't been used and make it about Oklahoma City and not necessarily El Sistema.

Laura notes Jose Luis's importance to the early formation of ESO, especially visioning. This comment echoes earlier comments of El Sistema acting as a prototype for a program that could be suited to the local community.

In the early stages of operations, ESO was an emergent form of education and attempting to get its bearing. It appears that Laura, site coordinator, had insight into how the idea of El Sistema translated well and not so well at the site:

> We're just like we like the idea [of El Sistema]. As we got older, we realized whatever their details were, you know, we didn't necessarily need. We had our own resources because we had so many community partners that we feel like we were able to build a program that really worked for Oklahoma City. I feel like really worked for our schools and our kids and our families.

As site coordinator, Laura had a distinct pulse on the day-to-day operations of the ESO. Given the high level of autonomy afforded to her. In turn, she has earned the respect of her co-workers (Director of Teacher Support and Executive Director). By all accounts she was not privy to the issues surrounding Jose Luis's departure. Thus, in a sense her view is that of an objective observer. In my view, this objectivity allowed for her to understand how the mission of ESO translates to the local community.

Regrouping. The decision was made for Robyn to assume Executive Director responsibilities in the interim. She provided notice to the OKCPS Foundation and she, Dr. Raiber, and Laura locked arms and developed a plan to bear the brunt of the work. Truly, while all interviewees noted this as a significant challenge, it was these three that formulated a workable plan.

The three of them developed a strong working synergy. I asked Laura, "What about transition whenever Jose Luis left? What was that like?" She replied:

> Really, easy. I mean me, Mike and Robyn just sat down and said okay, how are we going to do this. I mean easy but of course difficult change is always difficult. But I think because Robyn, Mike and myself kind of have so many different skill sets between the three of us that we're like okay, I can do that.

They all shouldered the burden that first year. Dr. Raiber and Robyn shared the role of

conducting, and eventually Mike can to take on that role and Robyn undertook responsibilities with logistics. Together, they developed a working plan regarding curriculum. Gradually, Robyn became the public face of ESO. Given ESO's transition to developing processes, Robyn's leadership style is a good fit. She is very much detail-oriented and seeks to empower others to make their own decisions. She also has strong passion for ESO and it shows, as evidenced by my first interaction with her.

Dr. Raiber stepped in where needed. Another significant factor in terms of music pedagogy was that Jose Luis's absence effectively removed one more layer of Dr. Raiber negotiating conducting and curricular mapping between ESO and OCU. He notes, "I didn't have to try to get into a conductor's head."

Rebalancing the game board. Jose Luis's departure and Robyn assuming the interim role of executive director was followed by a period of readjustment both on site and for all players involved in the case. Over the course of the summer the interim label was removed and she became the full-time director.

Without Robyn on staff, the OKCPS Foundation no longer had a strong connection to ESO and ceased to operate as in institutional player. Shortly after her departure, there was a change in the foundation's leadership that led to yet another strategy to support PK-12 education in OKCPS. Despite this, actors who were at the foundation during its initial involvement with ESO continued to support ESO in different facets. For example, one co-worker became the community liaison at the only community school in the district, which is served by ESO. Lori Dickinson, who was former executive director at the foundation, continues to be an advocate for ESO. In year three, at Robyn's request, she comes to serve as facilitator of an ESO task force to

strengthen community relations.

Chapter 6: Turning the Page to Years Two and Three

Over the course of its first year of existence, ESO had blossomed from a fledgling program to an emergent form of education that was growing into its big dream to transform the lives of children through music. The four emergent themes discussed in the previous followed a linear path and largely focused on the first year of ESO, which preceded my engagement to the case. In this chapter, I examine the four remaining themes that cut across ESO all three years, which are summarized in Table 11.

Themes	Applicable EPM	Events
Building Capacity: "We Wanted to Show it First"	Choice Structure	• Gaining 501(c)(3) Status: The Process of Individuation • Baking Research into ESO • Bussing: An Attempt to Adapt the Rules
Diversifying for the Future: Playing the Long Game	Rule Redefinition	• Grants as a Means to Diversify • The Stresses of Grant Seeking: Summer School.
The Social Mission of Music: "El Sistemaness"	Setting the Rules	• "It Starts With the Little Things" • El Sistemaness
Messaging the Mission: More players wanted	Endorsement	• Movie Night? • From Exploration to Communications Task Force • OMEA Concert • One Award

Table 11: Emergent Themes Cutting Across the Case

As discussed in the section "Researcher Positionality," I first became aware of ESO about halfway through its second year of operation. I obtained IRB approval for this research just as the ESO was beginning its third year of operation. During that time, I spent a great deal of time on-site, attending various meetings while conducting fieldwork. The vast majority of people involved in ESO, including the board, site

leadership, teaching faculty, and parents had been involved from the beginning. This consistency led to deep and meaningful interactions.

I treat the growth of ESO over years two and three as empirical evidence that ESO and hence the game of orchestral music education is gaining traction in the local community. I refer to this concept as massing of the object, which is presented in Table12. In effect, the growth of ESO over time demonstrates the object is amassing more players to the game of orchestral music education.

	Year One	Year Two	Year Three
Number of School Sites	8 (elementary)	11	22*
Grades	3-6	3-7	3-8
Number of Orchestras	1	2	3
Number of Students	94	172	220
Number of Teaching Faculty	13	28	36

Table 12: Massing of Object Over Time (* By year three, due to school choice and mobility many students moved across the district. This presented a host of challenges, which are addressed in the section "Bussing: An attempt to adapt the rules"

Building Capacity: "We wanted to show it first."

At both the board and site levels, ESO leadership was deliberate to build capacity on the front end. This is especially noteworthy since there were so many initial unknowns for the program such as budget, logistics, and how operations would be handled. Through fieldwork, I came to understand that while the actions were uncertain, a unified vision allowed for ESO leaders to share a fuzzy vision of what they hoped to accomplish. As a board member put it, "We wanted to show it first. You know before we asked for anything." The process, then, about ensuring capacity was continually developed so it could be utilized when needed for anything, as the quote indicates. In this section, I examine two such instances that exemplify this process: the decision to become a 501(c)(3) and the inclusion of research from the beginning.

Gaining 501(c)(3) status: The process of individuation. Initially, ESO operated under the umbrella of St. Luke's nonprofit status, and it was not until the second year when the board decided to seek its own 501(c)(3) status. This decision speaks to the unique nature and identity of ESO. In effect, it was and still is a ministry of St. Luke's and an extension of OCU. In addition, early on in year one it also received Robyn's support as what was in essence an in-kind donation from the OKCPS Foundation.

Much like the psychological process of individuation that occurs in adolescence, the process of becoming a nonprofit helped ESO become an authentic organization (Ziller, 1964). Pastor Greenwald noted that applying for 501(c)(3) status was a piece of the initial vision, "We determined it would be helpful that for 501(c)(3) for the purpose largely of fund raising and so we formalized."

The process of ESO finding its own identity, as opposed to that of its founding organizations (OCU and St. Luke's) is also evident throughout this process of incorporation to nonprofit status. Pastor Greenwald discussed the plan after ESO gained nonprofit status: "The hope was that most of the board members would have a connection to St. Luke's. So that there's still be a sense of this is St. Luke's Ministry." While this quote is relevant and interesting, I believe it would be mischaracterization to imply that he is saying board members are required to have a connection to ESO.

Instead, I believe he is speaking towards the importance of maintaining the values of St. Luke's. Remember, the Buseys founded and conceptualized ESO through the church. As Operations Pastor of St. Luke's, Phil also served as treasurer on the ESO Board of Directors. Also, Robyn and Laura were also employees of St. Luke's, while Dr. Raiber was an employee of OCU. St. Luke's provided a host of resources, including

payroll and professional development for Robyn and Laura. While OCU also provided a host of resources, including office space in the Wanda L. Bass School of Music for Robyn and Laura, research capacity, and training space for ESO teaching faculty professional development.

A consequence of becoming a 501(c)(3) is increased regulations, which occurs primarily through the tax code. Nonprofits with gross receipts totaling more than 50,000 are required to complete the tax form 990. It contains a host of information including revenue, expenses, and donations. During a board meeting I attended, the board was discussing the status of the budget. Steve Agee, Dean of the Meinders School of Business at OCU, who serves on the board, reminded the group they must enact their fiduciary responsibilities. Tactfully, he discussed the issues of finances and funding in what could have been a difficult subject, "As we [ESO] move away from being funded by Phil and Cathy and operates as a nonprofit, we will need to approve the budget for next year." This event is recorded in my field notes:

> Phil Busey, as Chairman and CEO of the DRG, noted, "We'll need to have a better understanding of budget, expenses, and income for that to happen." Robyn, Executive Director, respectfully explained, "I think we can all agree these are expected growing pains." Sensing there may be a bit of tension in the boardroom, I glance up from my notes. There is a distinct pause in the boardroom. Steve nods yes in agreement. Quickly, there are several affirmative head nods all of which are meant to indicate that yes these are growing pains. This lively discussion relates directly to the next theme, which is diversifying for the future.

The tactical decision of OCU and St. Luke's to serve as incubators for ESO contributes to the nonprofit literature. Vinokur-Kaplan and Connor (1998) examined nonprofits that acted as incubators. In doing so, they found the products of incubation

often reflect community and neighborhood rehabilitation or needs. Further, they point to the importance of geographic location, leasing structures, and organizational culture as important elements. The first two factors were addressed in chapter four. Institutions representing this case were close, and Trinity International Baptist was chosen based upon its geography. In addition, the initial lease was for one year, which was subsequently renewed. The third factor, is addressed in the section "The Social Mission of Music: El Sistemaness," which is an emergent theme of the case.

This case study enhances views of the nonprofit incubation process by examining it from the perspective of the organization being incubated. This is often not possible for two reasons. First, there is a dearth of case studies on early-stage development. Second, success and survivability rates for nonprofit organizations are low (Sawhill & Williamson, 2001). In this instance, the case did, in fact, take on organizational culture of the two incubating institutions by adopting St. Luke's values, which were enacted daily on site.

Baking Research into ESO. From the beginning, a high value was placed on research at ESO. Prior to his appointment at OCU, Dr. Raiber had created extensive scholarship in the field of music education. In fact, he served as the primary investigator on the collaborative research team for Oklahoma A+ Schools and co-authored an introduction to music education textbook (Raiber & Teachout, 2014). A curiosity to understand ESO through research was also a driving factor that drew Dr. Raiber to leave his position at the University of Oklahoma and come to OCU. He stated:

> I mean one of the attractions [of coming to OCU and ESO] with all of that is simply that we as far as anybody knows right now, we are one of the few El Sistema programs that is completely immersed in both a music ed philosophy and methodology along

> with the El Sistema philosophy and methodology. Looking at the research base we've been using to establish all that.

Here, Dr. Raiber is referring to the appeal of understanding how El Sistema, as both philosophy and methodology, relates to music education, which is his specialty. His dual roles of Professor of Music Education and Director of Teacher Support provided an unparalleled opportunity for him to develop, shape, and understand El Sistema through research.

The value of research permeated across the organization. Much like the teacher illustrated above, in his or her own way, everyone saw the value and necessity of research. For example, at one of the three board meetings I attended, a board report was provided on the update of the ESO webpage redesign. From field notes:

> The developer was present to demonstrate new features. He scrolled through the drop down menu coming to the drop down menu titled "About Us." From that menu there is a section heading titled "Our Results." Phil asked him to pause and he interjected. "I am glad this is on our website and it is copyrighted. It is important that we don't undersell the real value of this research report. It really validates the program. It is a real, significant landmark part of our program. I took my eyes off the screen to look at board members. They all shook their heads in unison.

Discussion ensued and I came to find, from the board's perspective, the research, while important, was about demonstrating ESO work so that when the time came they could draw on it to spread awareness and recruit potential donors. This is not a criticism per se, because in many respects that is the function of the board. As Phil indicated, the report is copyrighted and it is available for anyone to download at the ESO.

An analysis of the ESO webpage ("Our Results," n.d.) further validates its commitment to conveying the impact of the program. From the home page, there is a

dropdown menu titled, “About Us.” Selecting it pull up four options, one of which is “Our Results.” The research report is available in .pdf format, but it is voluminous, checking in at 81 pages. In an effort to communicate key results of the report, the web page highlights eight key outcomes in bullet-point fashion. Surveys were administered to children, parent/guardians, and school partners. Example include “94% of parents/guardians indicate that El Sistema Oklahoma has helped their child be successful at school” and “87% of children indicate that they feel happier or less stressed since coming to El Sistema Oklahoma.” (“About Us,” n.d.). Each outcome includes two key pieces of information: the respondent (parents/guardians and children, respectively) and area of improvement (school success and happier or less stressed, respectively).

I assert these eight selected statistics from the report is one means to examine how ESO attempts to convey itself to the local community and beyond. This data provides a small window into ESO’s attempt to frame itself to the local community by selecting a handful of statistics from a much larger pool. Thus, it serves as an opportunity to triangulate how ESO perceives of the significance of its work. I coded and categorized all eight statements for respondent and area of improvement. As a point of clarification, When coding, I adopted Heckman and Kautz’s (2012) working definition of soft skills to define the broad impacts of music education. According to them, soft skills are those which focuses on skills such character development, personality traits, and emotional intelligence leading to flexibility. Analyses are summarized in Tables 13 and 14.

Area of Improvement	Number of Occurrences
Soft Skill	4
School Performance	3
NA	1

Table: 13: Areas of Improvement from Web Site Data

The most frequently highlighted area of improvement is the promotion of soft skills, as opposed to school performance (Table 14). This corroborates ESO's mission of social transformation and the emergent theme of the social mission of music. Interestingly, the most commonly noted respondent is from the category is parents/guardians, whereas children and school partners are tied. This may speak to ESO recognizing parents as the most important authority in the lives' of children. I pick up this idea in the upcoming section, "Needing More Information on School Choice," in chapter seven. Presumably, these statistics represent board talking points, and as the board is an advocate of the game of orchestral music education this amplifies the importance of these statistics.

Respondent Cited	Number of Occurrences
Children	2
School Partner	2
Parents/guardians	4

Table: 14: Respondent from Web Site Data

The effort to build capacity should not be confused with lack of resources that plague all nonprofit organizations. ESO had developed a system that worked well, especially given its social mission, emergent identity, and complex relationship with its founding institutions. Yet, there were areas that required improvement. As an example, Dr. Raiber noted that his research was not occurring at the speed he desired and as a result he sometimes felt overwhelmed by lack of time. Where resources are available, ESO has sought to build capacity to help staff.

A central element of capacity building is developing roles for individuals within an organization. As ESO continued to grow in size, Dr. Raiber and Robyn developed a unique opportunity to lighten his load. For the first two year, he conducted two orchestras, which became a challenge, in terms of time. In year three, the decision was made to provide experienced teaching faculty the opportunity to conduct. He recalled, "that again came out necessity more than anything else…maybe even more importantly trying to develop capacity within the organization."

Ultimately, two faculty members each conducted an orchestra and Dr. Raiber conducted the third. While this did free up significant time for him, as Director of Teacher Education this brought the new responsibility of mentoring these two teachers, which he loves doing. He stated, "They needed to have that opportunity to grow from that experience as well…I really have enjoyed watching those things happen."

Other examples of building capacity for site staff included volunteers who helped on site and at concerts. Laura compiled tasks for volunteers to complete and they received the requisite training. Laura also had a staff assistant to help. For Robyn, the board provided professional skills to alleviate her many work burdens. These include, but are not limited to, marketing, communicating the message of ESO, and grant applications, which become more central to her role as executive director in year three of operation.

The commitment to conduct and disseminate the research is a microcosm of accountability, which applies to both nonprofits and educational institutions. Behrens and Kelly (2008) note the norm is for nonprofits to establish some type of capacity to collect data to demonstrate impact. Likewise, The culture of testing in PK-12 is well-

documented and discussed in chapter two of this research. ESO, as a nonprofit, does have a commitment to provide a public service. Clearly, ESO understands the role of data and was forward-thinking in recognizing data would put them ahead in the game of seeking grants, which is discussed in the upcoming section

Diversifying for the Future: Playing the Long Game

This emergent theme involves actions and strategies put in motion at the beginning of ESO for what I come to refer to as the long game. In the first section, I detail an attempt by ESO to change the rules or financial agreement of bussing students to the site. I then discuss two issues related to finances: initial funding and the development plan for long-term sustainability. Drawing upon the nonprofit literature, I examine this peculiar approach through the theory of mission drift and the moral responsibility of the founders and board to continue ESO. Next, I trace ESO's efforts in development, including the impact of seeking external grants. I conclude this section by providing an example of the downside of development.

Bussing: An attempt to adapt the rules. In the third year of ESO, the board undertook a concerted effort to reduce bussing costs. I include this event for three reasons. First, it is an excellent illustration of Cathy's plan of engagement to start at the top, when possible. Second, it embodies the "show it first" mentality to building capacity. Third, even though Cathy did not achieve the desired result, it demonstrates negotiation of the rules, according to the EPM.

Cathy attempted to exert capital by contacting member(s) of the OCKPS school board. Said Cathy:

> We went back [to OKCPS] and we said, "We came a couple of years ago and told you we wanted to do this. All we wanted was

> your blessing and we're not asking you for anything else." Well, now, we're coming back and we're telling you this is what we have done, this is the success we're having. It is making a difference and now we do have something we want to ask. "What could you do to help us? Could you make it easier on us with the transportation? Could we work out a deal where we don't pay for transportation? That's $17,000 a year out of our budget."

This approach illustrates the show it first mentality. Initially, all ESO asked was to work out a plan to make transportation a possibility. Now, that the board had felt like the effectiveness of the program had been demonstrated, they made an additional request. Cathy approached the board about reducing or sharing the costs. A board representative plainly told her this wasn't possible, as the program did not serve all kids in the district. This member referred Cathy to speak with the new executive director of the OKCPS Foundation. In turn, Cathy was informed the foundation was now focused on teacher grants and would not be of assistance. Cathy recalls, "That was it. The door was shut."

All was not lost, however, they changed their strategy by asking Scott Lane, OKCPS Transportation Director, what could be done to improve bus routing. He was invited to a board meeting at St. Luke's, which included an ensemble of ESO children playing. Mr. Lane recalled:

> Basically, they were asking about lowering the cost of the transportation and they were also showing hey this is something you all are involved with. They were asking for some more help on transportation and we were able to help them out quite a bit this year by restructuring some things. Like yeah, boys and girls club ½ full bus and ESO ½ full bus, so let's just put them together. We were able to do some changes as far as dropping pay. It was good. Yeah, that was the board meeting I remember thinking wow those kids are good.

Scott was able to creatively arrange transportation to help ESO reduce some costs, albeit not at the rate that Cathy originally sought. This example illustrates her attempt to

start at the top, and when stymied to not give up but enact an auxiliary plan and negotiate a solution.

Financing for the Future. The process from nascent orchestral music education program to 501(c)(3) involved numerous commitments and decisions. In this section, I examine the impact of financial support on El Sistema Oklahoma. While new nonprofits face a host of challenges, the most pressing is typically finances. As Dolnicar, Irvine, and Lazarevskit (2008) note, this often results in a tension between mission and money, especially as nonprofits become institutionalized.

A unique aspect of El Sistema Oklahoma is its fidelity to mission as it continued to become institutionalized. This is relevant to the ecological-political metaphor because at this point in the game, many nonprofits may succumb to mission drift, which is the tendency to stray from mission due the economic forces of needing additional funding (Jones, 2007). However, in this case the founders' commitment to underwrite the program afforded ESO the opportunity to stay true to mission during the process of institutionalization (years two and three).

The concept of underwriting or provide seed money proved a difficult one to understand. Early in my fieldwork, I broached the subject with a staff member on site. From field notes:

> I asked her about financial planning for this next year [year three]. She explained that ESO was given seed money for two years. The expectation is for it to become self-sustainable. She doesn't think the initial funders would stop funding altogether, but there is pressure for ESO to procure funding. Jokingly, she asked if I knew any corporate contacts.

While certainly there was some pressure, her joking manner does not convey a pressing doom. This view is corroborated by Dr. Raiber, whom I also interviewed at year three.

He noted, “The Buseys have contributed enough to fully fund my position for two years which would get me through tenure at OCU.” The two-year mark for seed money was a soft deadline, apparently.

Development as a means to diversify. The Buseys enacted a strategic plan regarding funding, which is attributable to their entrepreneurial nature. Pastor Greenwald clarified: “Their commitment was to underwrite the program to ensure that it got started with the hope that both individuals and foundations and other organizations will ultimately come along side and enable it to grow.”

Thus, the decisions to build capacity into ESO from the outset related to this vision. Baking research into ESO and nonprofit incorporation were fundamental steps towards seeking grants. Still, there was a concerted effort to procure funding through development. I asked Laura, site coordinator, if there was pressure of running the program day-to-day and having this funding stress looming. “Yes!” she agreed. While, the executive director deals more directly with these issues it affects her as well. Yet again, this illustrates the show it first mentality. The strategic plan of showing it was to set the object [ESO] in motion, fund it for an indeterminable amount of time, collect data, and then to seek outside funding, at least in part. Mission and values served as anchors to guide the board and leadership in decisions, and all the while the plan was to diversify over time.

In year two, ESO began a concerted effort at diversifying finances through grant development. The first grant did not require much time invested in procurement activities, as it was from the United Methodist Foundation. By year three, over 45% of ESO’s budget or approximately $264,000 had been sustained through grants from

foundations! ESO provides a unique model toward sustainability. This dramatic rise in funding from both funders and individual donations should alert us to the fact that something ESO is resonating with funders, which represent a unique public.

Exactly what is resonating is beyond the scope of this research, but it could be related to the issue driving this research, which is actors from the nonprofit sector stepping in or filling gaps to address the defunding of music education in PK-12 schools. Behrens and Kelly (2008) view nonprofits, and the foundations that fund them, as the social experimenters of society. According to this view, ESO provides a unique model of entrepreneurially-minded funders establishing a program with the intent to sustain it over a long period of time. To a large degree, this calls into the nature of democracy and role democratic institutions in deciding what social issues should be promoted in society. In chapter eight, Implications of this Research, I re-visit this issue.

Amount in dollars (percentage of total expenses)	Year One	Year Two	Year Three
Total Expenses	UNK	581,500	588,100
Number of grants awarded	0 (0%)	2 (17%)	15 (45%)
Approximate % of time executive director spends on development	UNK	30%	60%
Individual Donations	UNK	25,000 (4%)	60,000 (10%)

Table 15: Financial Diversification of ESO

This commitment to development demonstrates founders and the board were committed to the long-term success of ESO. Within the past decade, the nonprofit sector has become increasingly focused on fostering scalable solutions to social and educational problems (London, 2008). Most often, social entrepreneurship is viewed as means to pilot and test innovative solutions to existing problems or push boundaries (Bornstein, 2007). If programs or initiatives fail to demonstrate gains, philanthropists are inclined to discontinue funding and invest their capital in other social programs.

As a new organization, ESO was hungry to find grants and was, in a word, industrious. During professional development, Robyn noted, "Typically, these grants go to public schools, but they had gone unclaimed in Texas. We submitted and they were accepted." Another grant was through a donor-advised fund at a foundation that directs funding to local communities and sometimes the art.

The responsibilities of seeking grants fell primarily to Robyn, though Susan Franks, a board member with extensive experience in this area volunteered additional time in assistance thereby alleviating some of this burden. As indicated in Table 15, Robyn's time became increasingly devoted to development, so this process was not without consequence. As a result, Robyn adjusted her work schedule to host more site visits, delegate more, and potentially work longer days

Though there was no benchmark set, the grant application process was viewed as a success by ESO board and leadership. In board meetings, grants were frequently cited as a source of inspiration for the group. It is also important to note. the budget of ESO had stabilized over years two and three. This stabilization, in my view, was due to the fact that ESO leadership was happy with ongoing successes and contemplating what moves, if any, were available. This case study also presents an alternative approach to the usage of data by nonprofits. The Buseys were committed to playing the long game. At a board meeting, in an effort to rally the board around the significance of ESO, Cathy noted:

> I think the next step is what do we do with all of this success. Do we make it bigger? Do we add more students? We have to think of the many opportunities before us. Mark Parker did some work and calculated how much money it would take to shepherd our kids until they got ready for college and it is astounding. We have to consider how much responsibility do we have in carrying this

> forward. “We have taken on all of these kids, so what do we do?” This is not just about making another ESO site. Our original intent was to love these children.

This rich peroration is an excellent illustration of the board’s commitment to the long haul. It also demonstrates and effort to balance professionalism (usage of data and fiscal responsibility) with a moral and spiritual responsibility to education children for the long-term and the issue of potentially adding more children to ESO. For them, ceasing operations is not even on the radar. This is critically important, as Seitanidi and Ryan (2007) note many founders and philanthropists have a tendency to eliminate programs due to lack of funding or if the founders decide upon funding a different program.

Robyn was leveraging the two resources that placed her at odds with most other nonprofits: data in hand and having financial support from the Buseys. Regarding the latter, while I was not privy to innermost discussions on finances, I received the impression that she was not feeling imminent pressure or having to clamor foundations for their largest grants on the initial ask. Robyn told me, “in a lot of ways these folks are just getting to know us and this [the grant process] is about the long-term.”

While they certainly would welcome excessive and long-term grants, this process was like many others at ESO—deliberative. This is not to say that grants would allow for them to either serve form families or add more programming. Surely, they would, and the grants received were welcome and allowed them to achieve their mission in unique ways, such as being able to fund more concerts and add instruments, to name a few.

The downside of development: Summer school. Applying for grants can bring a measure of stress and uncertainty. One such example was a grant submitted to fund

summer school at the end of the third year. At the end of the first year, Dr. Raiber and Robyn made arrangements for summer school. They felt it was critical to stay engaged with families and not lose them over the summer months. The Buseys agreed and summer school was built into the budget and occurred over years one and two.

Given the early successes with grants in year three, Robyn applied for a summer school grant. The notification deadline in spring came and went without a response. With only a small amount of time left before school let out for the academic year, Robyn followed up several times, yet funding decisions had still not been made. Robyn received assurances that ESO would know by a certain date, but given the needs of ESO families, she felt it was imperative that summer school happen either way. She created a "B" option as a contingency. She, Laura, and Dr. Raiber worked furiously to ensure that families could be made aware of this option the moment they received word on the grant.

Ultimately, they did not receive the grant. They went with Plan B, which involved students coming to ESO one night a week for approximately 6 weeks in June and July. ESO coordinated with Trinity Baptist so that summer school culminated with students playing at their annual Block Party, thereby allowing students to perform. In all, about two-fifths, or about 90 ESO students, participated. Robyn and Dr. Raiber did not receive any additional pay for completing summer school, and a host of logistics were shuffled, including Laura and Robyn growing a new volunteer list due to the change of providing services in the early evening, as opposed to during the day.

In some respects, Plan B bring brought some new and positive changes to ESO, but it was not the desired outcome. For one, it allows for more convergence between Trinity and ESO. From field notes:

> Immediately I notice Kyle, the youth pastor, from Trinity. He is a big figure—about 6"6—so he is easily noticeable. He tells me he is a bit nervous because he hasn't played in forever. I didn't even know he played. He got his trombone out today to "make sure it hadn't seized up." Luckily, it was good to go. Later, I see him going up and high fiving kids asking about their summers. They are very comfortable with him, so I consider that they may attend Trinity. Playing in the orchestra, I think, gives him a different means to relate to them.

Prior to this interaction, I had visited with Kyle at concerts and he told me that several ESO kids were now coming to Trinity events. I also saw evidence of this at the Fall Fest. Small events like this allowed Trinity to be present in their community and simply be seen. They also may have served as a means to continue to evolve to the needs of their local community, or perhaps even to become aware of new ministries in waiting.

The Social Mission of Music: El Sistemaness

The social mission of music is the superordinate theme by which one comes to understand El Sistema Oklahoma. It is the guiding principle of ESO that puts teeth to its mission of transforming the lives of children through music. In and of itself, social mission is a nebulous term that conjures many different meanings. At a board meeting, Robyn noted, "We look like a music program, but that is just a tool to something more." In this section, I endeavor to convey the praxis of social mission at ESO and illustrate it through two issues central to it: commitment to creativity and music composition.

The broader philosophy of El Sistema provided ESO a helpful starting point in developing its own value system that works for the local community. When I asked

Laura about what they retained from the model of El Sistema, she said "An abundance of grace, hope, and joy. These are things from El Sistema global that I mean I feel like could work at any El Sistema program."

It Starts With the Little Things. One important element of social mission is how it is presented to children through a formal curriculum. Said Dr. Raiber: "One of the ideas was to try to put a social curriculum in place. So students would come in and go to class and learn about all of these things. In my mind I couldn't wrap my head around that and have that be authentic." It is important to note that Dr. Raiber is a scholar and experienced music educator, yet even he struggled with how to put social mission into action in a deliberate and meaningful way. By no means is this a knock on his ability, but rather this quote speaks to his deep values, as an educator. He understands the importance of authenticity.

By nature, any discussion on enacting a social mission includes an element of reflection of the self and one's core values (Bruner 1997; Martin, 2002). Dr. Raiber was willing to engage in this process. He noted:

> I flashed to all those middle school assemblies where the guy comes in and talks at you for an hour and somehow that's supposed to change your life. I just couldn't see that making a difference. So what I thought first of all we've got to model that through all of the endeavors with each other, our families, the way we interact with our students.

This process led him, as Director of Teacher Support, to appreciate the value of modeling key values. Laura also expressed the importance of modeling, "We really tried to extend grace not just to our kids, not just to our families but to our faculty members. To you know, each other and hope." ESO makes it a point to include a class of music history and multicultural education.

Grace and hope are concepts rarely discussed in formal educational institutions. Their application through ESO speaks to the role and power of community educational institutions. This is an apt illustration of Jane Roland Martin's (2011) view that nonprofit structures, as a form of democratic institutions, are also critical in inculcating desirable social values.

In effect, what ESO was striving to do was to create a culture of care. This is guided by two sources, the first of which is El Sistema. The second is values from St. Luke's. At one of our meetings, Robyn shared with me a laminated set of guiding values that all ministries of St. Luke's are expected to abide by. In fact, as employees of St. Luke's, Robyn and Laura attend monthly leadership meetings for all St. Luke's staff. These have significantly impacted Laura. She tells me there are about twelve guiding values and they guide her daily actions on site. As she put it: "Attention to detail, grace, put on your listening ears, all these things like have goofy kind of tag lines. But, when I'm on my 50th call to a family it is that attention to detail. So that when the kid hits the door I know that her mom just got diagnosed with cancer I know it."

Laura Moon, it could be said, personifies the social mission of ESO, as she interfaces with families, children, and teachers, when needed, five days a week. Her makeshift office of two folding tables, a laptop, and printer was located purposefully right at the street entrance. As children arrived from the bus, Ms. Moon was typically the first face they saw. In an attempt to reduce stress, there was discussion to move her to a more private location where she could have sensitive discussions with students, but this proved ineffective as she had many of those discussions while the majority of kids were in class.

Typically, it takes years to build a culture of care, but as a fresh upstart with many impressionable, young music teachers looking to them for guidance, Robyn and Mike realize they had a unique opportunity to create something special. Thus, social mission is an important fixture of professional development.

El Sistemaness. The importance of social mission is practiced daily at ESO. In fact, I came to find that staff had developed a catch-all term: El Sistemaness. This word came to symbolize a pride that ESO stood apart from other El Sistema-inspired sites. While on site or at concerts, I would occasionally hear it. As an example, Robyn was addressing the teaching faculty at professional development and noted, "How we handle and support students will be a hallmark of us. When they talk about the El Sistemaness of our program this will be it.…This is abstract stuff that most places don't talk about."

El Sistemaness is an amalgamation of the care, values, and beliefs of the social mission. I literally searched through my NVIVO research database I was unable to find a succinct definition of the term. It dawned on me that this is its beauty. It embraces ambiguity by allowing for individuals to construct their own meaning provided they are all consistent with the social mission of ESO. In essence, it is woven into the fabric of the program.

El Sitemaness was readily on display at concerts. One such concert required children to arrive at OCU at 7:30am during fall break for a concert in the Wanda L. Bass Recital Hall. Robyn. Laura knew this would present several logistical challenges, one of which that is was during the work week and many parents/guardians would have difficulty getting their children on site due to work. I attended as a researcher, and Robyn asked me if I could man the drop-off spot to welcome children and ask parents if

they had any questions. This is well-illustrated in a vignette from filed notes:

> Another volunteer and I are manning the front. Just as we are about to head inside, a rusted, blue Nissan arrives. I see XXXX an African American girl of about twelve that I have gotten to know a bit. I open the door for her in an effort to make her feel welcome. Her mom looks at me apologetically. She says sorry and I can see that XXXX is embarrassed. I tell mom it is okay, and try to assuage XXXX by telling her I was the last adult to arrive and she hasn't missed to much. As we walk up the stairs, I ask her about break. XXXX's teacher and Robyn greet enthusiastically telling her how great it is to see her. It is noteworthy, that there is zero admonishment for tardiness, but rather the message is we've missed you and we're so happy to see you. XXXX glances to the stage and sees her peers already warming. She becomes to choke back tears. Robyn embraces her and jokingly tells her that she is so glad she is here, otherwise she (Robyn) may have had to play (and she hasn't practiced in weeks). This seems to hit the spot and XXXX regains her composure.

The stress of the moment cannot be understated. This student was the last of the 60 or so students who comprise the Esperanza orchestra to arrive, which means she would taking the stage in just moments with little, if any, practice. As indicated in this vignette, I was (an am still) most struck by the effortless way in which Robyn and other staff simply embraced this young girl. In my view, the heat of the moment is when you can most often tell a teacher's true values and character. There was not one hint of frustration. It is also noteworthy that Robyn exhibited this behavior in front of another teacher. This speaks to the daily interactions of modeling that Mike referred to.

Not to be lost in this vignette is what may be happening in this young girl's life. By year three, Robyn, Mike, and Laura have gotten to know about 220 kids and their families. In many instances the kids open up about what is going on in their lives. As an example, I attended a leadership meeting between the three of them. The jet-paced, ninety minute meeting was far-ranging. A focal point in the meeting was how to best serve the needs of individual kids. From field notes:

> **Mike:** Have we followed up on students who were not at the

performance last week?

Laura: that would be XXXX and XXXX

Robyn: I'll handle XXXX. I can tell her we need more commitment. Mike, can you talk to XXXX and her mom?

Mike: Yes, the parents need to know that it wasn't just XXXX being there it just doesn't affect her but it affects everyone. Her not being here effects 65 other people.

This exchange demonstrates they make decisions of contact by who has the best likelihood of effectively communicating with that child and or family. It also underscores an understanding that children aren't responsible for all of their actions, i.e. transportation in this case. And, given the close bonds they have formed with many parents/guardians, a social mission of ESO is to break patterns of social reproduction by counseling parents in a unique way that is based on trust.

At that same concert, Dr. Raiber wished to express gratitude to students. I was standing stage left as he was conducting the orchestra in pre-concert practice. Robyn came and stood next to me and said, "Watch this." A few moments later, he indicated for the children to come to stop. He asked them to feel under their seats (or instruments in the cases of percussion). Hearing some shrills of excitement, I craned my neck to see what was happening. Robyn smirked. She said he got here early and placed a notecard and full-size Hershey candy bar under each child's seat. She said I should ask a child if I could read his or her note.

Moments later, kids began filing off stage towards me. They were hurriedly unwrapping their chocolate bars and note cards. I saw expressions of glee and I was quickly reminded of the scene from Willy Wonka and the Chocolate Factory in which Charlie unwraps his bar to find a golden ticket. And, while these cards weren't golden,

many children held them in high regard. A young boy I didn't know made eye contact with me. He showed me his card. As he got closer I noticed it was about relatively small at about 4" x 3", though it looked larger is his small hands. It was outlined in teal, and centered with the words "Just a Note." Above the lettering was a full music note.

The student asked me to open it. I did and it flipped open vertically. I read it aloud. It said, "Brian, I love how engaged you are in every rehearsal. Keep asking your great questions! Thanks for being here today, Dr. Raiber!" Given the moment, I expected a significant emotional reaction, but he shrugged and returned to his candy bar. I was a bit shocked, but I reminded myself of his age and thought perhaps he was excited on the inside. Or alternatively, maybe was unaccustomed to receive such feedback. At any rate, who am I to judge how he felt.

I have reflected on this moment since then and I have come to appreciate it in a different light. Much like how I interpreted the modeling example above, it is the little things that lead to systematic change. Brian may or may not recall this particular event, but it is likely that many years from now he may remember any of the following: he played an instrument in an orchestra, played on stage about six times a year, his parents/guardians made the commitment to pick him up five days a week at Trinity, he got an extra meal five days a week, and everyday he interacted with lots of adults who cared for him. Understanding social mission through program recipients i.e. kids like Brian is a worthy endeavor, and by this measure, ESO was truly transforming lives through music.

Messaging the Mission: More Players Wanted

As board leadership more clearly recognized the identity of ESO, they then

sought to educate the local community about its significance. This is important because the object had been created from two larger institutions. Thus, the autonomy afforded by 501(c)(3) status was a catalyst in this process. Robyn, however, as executive director and the face of ESO, was also critical in relaying key facets of ESO to the board, including its social mission. In essence, she became the social advocate, while Mike and Laura focused on site processes and logistics.

In this section, I discuss the recursive process of ESO becoming endorsed by the local community and beyond. This may be best viewed through internal and external sources of endorsement. The former includes the multiple means by which existing players in the game of orchestral music education, including the board, parents of children in ESO, and other community actors, came to appreciate the game over the course of its existence. External sources can be categorized as experts within the nonprofit, educational, and music education sectors. I treat recognition from the Oklahoma Center for Nonprofits, Oklahoma Music Educators Association, and other music education associations as evidence that ESO is becoming increasingly endorsed as an award-winning game.

In my assessment, while messaging the mission was initially driven by the desire to seek outside funding, there was also something more significant at play. This process of messaging, which began in earnest in the fall of year three and was ongoing at the end of my research, was also about collective reflection on understanding ESO's role in the ecological system. While some of this reflection was individual, much of it was deliberative through board discussion, and some reflection occurred through the formation of a communications task force, which included a seasoned facilitator. All

this is to say that messaging was a robust, multi-tiered process that cut across the case.

From my vantage point as researcher, I witnessed and experienced a host of these events, including direct observations of board and communications task force meetings, participant-observations through informal interactions and interviews.

Movie Night? Although I didn't realize it at the time, when I first began my research the process of messaging the work of ESO was already occurring. In fact, the website update discussed in the section titled "Diversifying for the Future" was the first step in this process. At the first board meeting I attended, Dean Parker floated the idea of ESO hosting a movie screening to promote awareness on its social mission. From field notes taken at a board meeting:

> Cathy [chairing the board meeting] states "Now for an opportunity." She notes there are about 90 ES orchestras now and each are unique. She asks Dean Parker to speak. He says, Jaimie Bernstein, daughter of Leonard Bernstein, has produced a movie about El Sistema [Crescendo: The Power of Music]. It profiles two orchestras. It has taken her about five years to make it happen, but it is now done and being previewed across the country. We have the opportunity to screen it here. Jaime is willing to come to OKC for a preview. In other cities with ES that they have previewed it they have had the children play after the screening. We would like to do something similar here and have it as a promotional event.

There were a host of affirmative responses, with one board member stating, "we need to do this." Cathy noted there were several logistics to work out, including whether ESO would charge admission. She called for an exploratory committee and three members volunteered. In many ways, I find the strategy is reminiscent of the El Sistema Symposium prior to year one. It included Jaimie Bernstein, who spoke at the symposium. The thought was that this would be a dramatic means to introduce the philosophy of El Sistema to the community at-large.

Following the board meeting exchange, I found the issue of the screening spurned a series of discussions because ESO was only in the early phases of understanding how to communicate its message. The internal debate was far-ranging on whether ESO should pursue this. I found that opinions on the issue were diverse and there was politicking between board members. Following an interview, I made this analytic memo:

> Maybe, as a model, El Sistema has tapped into the importance of people seeing/experiencing music through not only its performance but also its creation. Several times Susan [Gabbard, then-Fine Arts Director at OKCPS] referenced the importance of being on site and seeing things. At many places practice is a closed door process, but ESO makes this an open experience for the community it serves (as it welcomes anyone). Baker (2012) views this as propaganda, but maybe he is missing the point. As a community structure with open-access, ESO allows people to experience the joy of music through not only performance, but creation. In this way it self-advocates for the arts. Could other forms of the arts mimic this process? If so, what would that look like? We, as a society, are all about reality TV, documentaries, and narratives are the rage (Waiting for Superman, new ES movie). I think there is something happening here…

Similar to the board, I was wresting through the process of understanding the importance and potential benefits of the movie screening. While my questions were more theoretical, questions raised by the board included: 1) what would the structure of the screening be?, 2) was ESO reading for a "big splash" event?, and 3) is this the purpose of this event to raise awareness raise donors? This last question was the most pressing as it drove all decisions in the process.

Up to this point, ESO had gained mild attention as a special interest story. It had been featured a few news channels and two players from the Oklahoma City Thunder came to interact with the children, which brought additional media attention. Robyn and

the board attempted to parlay these events into increased media attention, but had yet to have what some on the board deemed as a significant breakthrough.

From Exploration to Strategic Task Force. The ecological-political metaphor notes the importance of endorsement of actors within the local community. In essence, the board viewed this screening as a potential springboard to update the community on the successes of ESO, and in some cases introduce the game to a new group of people who may be willing to fund the program. This brings into focus the issue of exactly who in community would need additional awareness of the work of ESO. Prior to the next board meeting, the exploratory committee had been renamed to the strategic task force committee, which denotes the significance the board was placing on messaging. The stakes were high, indeed.

At the next board meeting, a Task Force Committee member provided a report to the board. He noted that Lori Dickinson, former Executive Director of the OKCPS Foundation, facilitated the committee. At their first meeting, it was brought to the task force's attention that YOLA (Youth Orchestra Los Angeles) would be performing at the Super Bowl halftime show. The committee thought this presented an opportunity to ESO to take its first stab at marketing. Said a Task Force member, "At that meeting we decided to do a Facebook boost [of our concert video]. This is our first time. Basically, we spent $100. We added 111 new members to our group since Monday and now we have about 800." The goal of this boost was to begin a strategy of increasing likes in the local community, thereby broadening the base of community support of El Sistema Oklahoma.

It is important to note that up to this point, Facebook had served as the primary

means of communication by ESO so marketing ESO through this means makes sense. In essence, it had become a gateway to present the game of ESO to the local community. Posts included videos of concerts and awards and recognitions of students, staff, and volunteers. There were other interesting events, such as the first student ambassador tour provided, of which I was the recipient. The majority of posts were in English, but some were in Spanish. The majority of posts were from Robyn, as the main messenger of the program, but others were from board members, site leadership, or teaching faculty, and parents who post concert videos. Robyn was deliberate in recognizing donors through Facebook, when appropriate.

At this same board meeting, Robyn noted that very few people, herself included, had actually seen the movie, Crescendo. She noted this was the fault of no one, but due to busy schedules and a general lack of time for individuals to view the movie. This tactic of deflecting any blame proved effective, as members agreed with her assessment. The suggestion on the table then became to host an internal movie screening. What unfolded was a unique conception of community organizing around the social issue of orchestral music education.

Robyn suggested that ESO hold a private pre-screening to be followed by internal dialogue to clarify the message of ESO. From field notes:

> For her, this pre-screening is about "leveraging the home team." By that she explains that this is about understanding how the movie that aligns with the mission of ESO. "We need to start with our own staff and supporters to understand that."

The details weren't fully conveyed but it was to include current players, including board, site leadership, teaching faculty, and perhaps volunteers, parents. The goal being this multi-tiered approach to community organizing would allow for participants to

articulate the message of ESO. This screening was tentatively scheduled, but after continued debate by the communications task force it was tabled until a later date.

In his original pitch, Dean Parker noted that other El Sistemas had showed the movie and had children from their El Sistema-inspired program play after. Interestingly, this did not resonate with the board. At one point, Robyn told me that she was not sure that showing the stories of three other children was the most effective route to updating the local community about ESO because so many great things were going on here. A potential workaround put forth by the board was having a panel discussion or having children discuss what ESO means to them, but neither of these discussions galvanized the board.

According to the ecological-political metaphor, this extended debate on the screening could be due to the tacit recognition of the importance of the game occurring within the local community. The committee and board wanted to maximize potential impact of the screening, while focusing exposure on ESO, as compared to other El Sistema-inspired affiliates. And, while the latter is the approach taken at other affiliates, the board and Robyn were reticent to take such an approach because they sensed that ESO was distinct from the broader El Sistema philosophy.

The idea of the movie screening lost traction and did not come to be. It would, however, be a mistake to minimize its importance on aiding the board to understand what ESO is really about. This is well-said by a member of the board: "What this really came down to is what is the message of ESO and we decided we weren't ready to put that movie out there without understanding what the ESO message is. So we decided we needed some help." As the case with any organization event, it is critical to know what

your message is and who your audience is. I contend that ESO had not yet fully determined either of these two key components. The remainder of this section deals with those issues. I discuss one more matter of internal endorsement and then discuss transition to discuss how the external community has endorsed the work of ESO.

The Squeaky Wheel Gets the Grease. While conducting fieldwork, I interacted with students and parents. Over the course of several months, I became a frequent fixture both on-site and at concerts. Daily pick up time and pre-concert activities afforded the highest degrees of interactions with parents. While the majority of these interactions were small talk and informal exchanges, I did come to know some of the parents and families relatively well. One such relationship provides an excellent illustration of how ESO allows for bilateral capital exertion and the interrelated spheres of influence that occur within ESO.

John Hinds [a pseudonym] is unique in that his child had participated in ESO from the beginning and he also served on the school board of an enterprise school within the OKCPS district that was also served by ESO. Wednesday happened to be the day I most often conducted fieldwork on site. In terms of curriculum rotation, this was typically a "C" day, which meant that Esperanza students (one of the three orchestras) would typically rehearse at the end of the day. John's daughter was in the Esperanza orchestra, so he would typically arrive early to watch. He and I came to know each other. He was politically active, has worked as a lobbyist, and heavily supported the public schools. He was very animated.

I asked him how he came to know about ESO. He explained that three years ago he was the PTA President at an elementary school that was selected to participate in

ESO. The principal told him about he really, really needed to know about it. He told me he thought it would be great for families. From field notes:

> There are a lot of Latino families there and they don't know about many programs or "how to make connections for themselves," he explains. He sees his role as PTA President as connecting them to resources. He says, "I thought this is great for these families, but this thing won't be for us." He places a lot of inflection on the latter part of this statement as if to say he and his wife have the ability to pay for activities, but others don't and as PTA President he saw it as a great opportunity to improve equity. As he came to know more about it, however he thought it would be a good fit as his daughter who was already playing a stringed instrument.

There are two pressing issues detailed in this excerpt. First, as a Latino and PTA President, Mr. Hinds felt compelled to advocate for families that are unable to allocate time to discern program or activities for their own children. Second, in playing the role of advocate, he immediately saw the potential benefit for children in this school, however it was not readily apparent to him that this would appeal to his family. Apparently, he and his wife had exerted financial capital so that their daughter could play. For him, it was the high level of music education and social mission that made ESO an amazing experience for children. In fact, I really didn't even have a chance to ask him questions, because he told me voluntarily and excitedly. He went on to tell me, "We need like 5 El Sistemas in OKC." Clearly, John is referring to relative need in a high poverty district, which contains disparities in not only music instruction, but educational opportunities in general.

Given his roles in PK-12 school, I asked him how ESO could affect educational policy. He looked at me pointedly, and said, "I am going to tell you a story about when I worked in Texas." He implored me to stick with him during this analogy of how he

worked in secondary fibers, which he tells me is essentially recycling with the intent to re-manufacture the materials into anything and everything such as cars, paper cups, even furniture. From filed notes:

> Anyway, I just kind of stumbled into it. I started low in the company in sales and began traveling with a head sales guy. Within a year I was really climbing up. We mainly did corporate, but I asked them why no schools. They told me there wasn't enough money in it. After lots of asking questions and coming to know the process I figured out the magic number of pounds for us to service a site for recycling and got one school on board. Well, it just so happens, through friend I met this president of a bank. He calls me and says his eight-year-old son had been learning about recycling about school. He was busting his dad for not recycling at his work. Man, that was it. I got the corporate contract from the school contract.

At this juncture, he smiled and paused to see if I understood. I thought I did. Without hesitation, he told me it starts with changing the kids. "We all need to think more holistically about kids," he tells me. He points to the orchestra and says, "these kids are learning so much more than music."

I asked him, why he thinks music education is losing relevance in PK-12 schools. He noted the soft skills associated with music education by stating, "It's ignorance. People just don't know how important it is for kids. They learn good habits, studying, perseverance, and so on." Clearly, He delineated himself from the others because he witnessed this firsthand with his own child.

At that point, John was working hard to further convey the significance of ESO. He told me, "I know how much the founders, Dr. Raiber, and Robyn have put into this, but they need to get the message to [OKPS] administration to expand the program. You know, it's like they say, the squeaky wheel gets the grease." This relates to messaging of the mission, because John is providing another means to mobilize the community to

bring attention to ESO. This approach is based upon what has worked in his experiences in the past. It is unlikely this approach could become effective because OKCPS was operating with limited dollars, which continued to dwindle.

External Endorsement. In year three, the local community began to take notice of ESO. I treat these acts of endorsement by the local community as evidence of increased appeal of the game of orchestral music education. In this section, I discuss three such acts.

OMEA Concert. One of the most significant events that occurred during my fieldwork was the ESO Esperanza Orchestra playing during fall break at the OMEA (Oklahoma Music Educators Association) event. (I discussed this concert during the section "Social Mission of Music.") OCU hosted this event and Mark Parker suggested to Dr. Mike Raiber, who also is past-President of OMEA, that ESO should open the conference. This was significant, as the crowd would be discerning music educators many of whom have heard of ESO. And, given Dr. Raiber and Robyn's reputations in music circles, the expectations would be sky high.

For their part, Dr. Raiber and Robyn did not seem particularly nervous. They and other staff worked to keep the kids loose and encouraged them have fun. The students were to play three pieces. As concert time drew near, I took a seat and noticed some peculiarities. The current President of OMEA took the stage and noted that ESO was a partnership between St. Luke's United Methodist and OCU. Then, from field notes:

> For the final piece, the kids begin to play and it is going very well. About ninety seconds into the piece, the stage lights go out causing the stage to become pitch black! The kids continue to play and literally don't miss a beat. The lights come back on in

> about 5 seconds. Unbelievably, this happens twice more, each creating two to four seconds of darkness. The kids continue to play through it all. Once the piece is finally completed, they receive standing applause.

This applause signified more than recognition of quality music created by about 60 10-14 year olds. It represented appreciation and awareness that all music creation transforms. ESO uniquely represents the power of music in this regard. In all likelihood, each PK-12 educator in attendance saw ESO as something different, as it should be. Some may see it is what is possible, others as what could be, and still others may see it as radical. What is irreducible, however, was that ESO represented El Sistemaness.

After the concert, I came to find that Dr. Raiber had presented scholarship on El Sistema at two regional research conferences, and was soon to present at an upcoming national music educator conference. All three of these conferences are peer-reviewed. Robyn, on the other hand, would soon be presenting at an Oklahoma nonprofit conference on what else, messaging. Cumulatively, these conferences are evidence of endorsement occurring beyond the local community.

The One Award. Each year, the Oklahoma Center for Nonprofits requests nominations for exceptional nonprofit organizations across the state for the ONE Award. The requirements are that nominees employ the tenets of excellence in their operations every day. Nominated organizations are then assessed by an independent selection commission and winnowed to three finalists across eight categories. In 2016, ESO was recognized as a finalist. Furthermore, ESO was identified in the category of "Education," as opposed to "Arts and Humanities," which could be viewed as evidence of the local community's recognition that it is intact a unique form of education that seeks to transform lives through music education.

While ESO did not win in the category of education, this recognition proved fruitful. ESO was profiled in publications across the state and tasked with producing a three minute video highlighting its work. Testimonials from students, parents, and staff were combined with data from the research report. The development of this video served as an additional means for ESO to hone its message, specifically for a nonprofit audience that included a host of could-be donors. I attended the award ceremony and noted the potential impact of this award. From me field notes:

> The room is packed at this black tie event. Each Nonprofit has a table that is peppered in a sea of well-dressed, potential donors. Two news anchors emcee the event and provide plenty of banter. For each category, brief vides are shown for each finalists, then a representative goes to the stage and the winner is announced. Robyn, Pastor Greenwald, Cathy Busey, and a few other board members are present to represent. During the video, I glanced at the table, anxious to see who would represent—it was Robyn. I knew it.

I find this experience consistent with what I saw in my fieldwork. In most instances, Cathy would prefer to stay in the background, as would Pastor Greenwald. Robyn had truly become the face of ESO and she wore it well by articulating the social and educational mission of ESO. During my interview with Cathy, insightfully she noted, "I think she sees herself as the principal of the school . . . that's how she sees her role and that's so critical to what we're trying to do." As executive director, Robyn had achieved a rare opportunity to be a principal unchained to ills that often limit music education in PK-12 schools.

Chapter 7: Problematizing Social Need

In this chapter, I address research question number two, which is: what form of social need does El Sistema Oklahoma (ESO) meet? I have adopted Kettner, Moroney, and Martin's (2008) four-pronged typology of need as a theoretical lens to respond to these questions. The four types of need, according to them are: perceived, normative, expressed, and relative. Conceptual typologies such as this one are helpful analytic tools in that they allow for categorization of data and dimensional analysis of data (Collier, LaPorte, & Seawright, 2012).

In this research, I take a tempered approach in that I do not seek to definitively answer which need(s) ESO is meeting, but rather I problematize what form of social need(s) is being met. In an effort to present this analysis of social need logically, I include one section for each of the four types of social need. In doing so, I examine evidence for each need.

Ultimately, through empirical evidence, I arrive that all four types of social need are met, albeit to varying degrees. This in and of itself is not contradictory to Kettner, Moroney, and Martin. In fact, they maintain that robust service delivery should be pluralistic by meeting two or more needs. I make the tentative assertion that ESO illustrates an idiosyncratic form of social need that evolved over time and may defy this conceptual model, which I address the in the final section of this chapter, "So, Whose Need is Being Served?" I conclude this chapter by reflecting on the case through a Deweyian notion that ESO is one of multiple publics occurring simultaneously within the local community.

Perceiving Need

Regarding social need and philanthropy, it would appear the obvious response to whose need is being met is that of the founders. As discussed in chapter four, Phil and Cathy Busey conceived of ESO with the intention of doing something transformative for the community. Cathy and Phil were attune to what needs were currently being unmet in the community. Cathy's limited experiences in after school programs influenced her view that there was an opportunity to help families through creating a program that serviced needs after school.

The founders' lived experiences influenced the needs they perceived in the local community. For instance, Cathy's experiences of playing music played a formative role in the selection of El Sistema as the program that would be implemented in Oklahoma City. Whereas, Phil's earlier attempts of affecting school reform coupled with his entrepreneurial nature may have contributed to his desire to effectively start-up a social program.

The founders' strong relational ties to St. Luke's and OCU contributed to them working through these institutions also contributed to perceiving the needs of after school programming and music education. Using a multi-case approach Sarah Reckhow (2012) demonstrates that seasoned philanthropists are more likely to engage unilaterally with districts due to their political and financial capital. Though the Buseys had both forms of capital as demonstrated in the section "The Buseys Plan of Engagement," they were willing to engage with OCU, St. Luke's, and then the OKCPS Foundation early in the process. Early involvement by these institutions shaped the course of ESO actions and strategies, including the eventual hiring of key staff.

As unseasoned philanthropists, the founders actively sought community partners who were also invested in a common good in the community. This research demonstrates that the two partners—St. Luke's and the Wanda L. Bass School of Music—had different motivations to get involved, yet there was common ground in a belief of the transformative power of music education. This same principle holds true as to why the OKCPS Foundation and Fine Arts Directors came to support the mission of ESO. The participation of multiple actors is evidence to the overarching belief in the social mission of music and soft skills it promotes.

The community school as a litmus test. At least not directly, parents, children, and the broader community did not express the need of an after school music education program to the founders. Perhaps, if given the opportunity they would have asked for STEM (science, technology, engineering, or mathematics) education, music, or something else. This brings into focus a key issue that high poverty communities often lack choice structure in the form of programs and services.

At the time of this research, OKCPS has only one full-service community school, David R. Lopez Community School at Edgemere Elementary. This school happens to be one of those served by ESO from the beginning. In being a community school the vision is to be a full-service school where families can have a host of social needs met (Balfanz, 2011).

Despite strong communications between ESO and the school, attendance from this school site has remained relatively low. In fact, at one point Edgemere was allocated up to twenty enrollment spots, yet only three only three students from Edgemere participated in ESO. Robyn and the Community Liaison at Edgemere, Colin

Strickland, worked together at the OKCPS Foundation. By all accounts they have excellent communications, so the lack of participation is likely not attributable to lack of communications or trust.

Edgemere offers nine after school programs, including ESO. These programs vary in terms of delivery site (on or off school grounds) and cost (free, subsidized through grants or cost), and required attendance. In my interview with Colin, he hypothesized that increased choice structure may be one of the reasons Edgemere had not reached their allocation of spaces. While it is beyond the scope of this research to make any definitive claims regarding why Edgemere has relatively low participation rates, it does serve as a unique, embedded case. Low rates could be attributable to Colin's claim and those would be consistent with Moxley (in press). He considers the lack of choice structures in marginalized communities as a severe detriment to public education. To this point, the other schools represented in the case lack fewer afterschool choice structures.

This case demonstrates that early engagement with partners in the local community may contribute to a more inclusive game of orchestral music education. As more actors became engaged, the founders were willing to broaden the vision of what they hoped to achieve for the community through ESO. An excerpt near the end of my interview with Cathy relates to this point:

> **Interviewer:** It sounds like that I knew that you and Phil came in with some very deep sound reasoning on why you want to do something that's kind of transformational. But that being said, it sounds like the experience has changed you guys.
>
> **Cathy:** I think for me, it's on a different level than what you probably expect. I had to learn to let Robyn be Robyn and make some decision that maybe I don't know about that trust

> level…But by listening to them, maybe they had a different better idea and I have learned to go with that and let go of my own perceptions and ideas and expectations and let it be a group decision for Robyn, Mike, or Laura. I had to let go because we would all be miserable if I tried to do otherwise for lots of reasons…And I think that's a lesson for a lot of things I'm involved in.

Admittedly, this was not my best interviewing moment. I erred by doing Marshall and Rossman (2006) caution as potentially leading the participant through questioning. This is why I included my question, instead of simply the response. Though the response may be somewhat tainted, it is still compelling.

For Cathy, the past three years or so has been an unexpected journey. In this chapter, I have presented evidence that ESO is not simply a case of founders creating a program based exclusively upon preconceptions. Throughout the process Cathy (and likely by extension Phil) has been willing to engage in reflection and learn from others. Ironically, it was her willingness to trust and empower others such as Mike, Robyn, and Laura and families that contributed to her own transformation.

Expressing Need

Earlier, in this research I made the assertion that 501(c)(3) nonprofit organizations are well-positioned to address social need and innovate new solutions because they address community needs. In this section, I discuss three instances in which the parents and guardians attempted to exert social and cultural capital through democratic participation in El Sistema Oklahoma (ESO). I treat these instances as evidence that ESO does allow for the mobilization of the expression of need.

*Need Expression Versus Non-negotiable Principles***.** The first two instances of need expression are similar and share a commonality. From the outset, site leadership drew

lines in the sand that certain principles would be altered. One such line was limited allocation of curricular time, so that the bulk of time could be devoted towards music education. The second line was only providing transportation from selected school sites. As the primary mission of ESO is social transformation through music, it makes sense that resources in the form of time and budget would be guarded to promote music education. Parents and guardians, however mobilized to into action to bring awareness to community needs resulting in negotiation of both policies.

Needing Additional Time for Homework. From the outset, ESO was to be Monday through Friday, three hours a day after the public school day with pick-up being at 6:00pm. Attendance and commitment were strictly enforced. At his lone school site visit to recruitment, Jose Luis underscored the importance of these two elements by noting they were central to program because of the vibrancy of the nucleo. The concept of the nucleo is a preeminent factor in El Sistema, as it is for learning, experimenting, and interacting.

Initially, homework time was enacted through a study hall format, which was supervised by music teaching faculty and unstructured. Effectively, children were responsible for completing their work and faculty could help as needed. As time pressed on, parents expressed concerns as children were not fully completing their homework and more importantly were too tired to complete it, once they arrived home. Surely, attending school and going directly to ESO created long school days for children. Changes were made early in the program to some avail. According to Laura (site coordinator), there were several issues including, students at different grades and

different school sites some of which were charters and magnets. And, this is not to mention variations among students some of which induced IEPs (Individual Educational Plans). Indeed, this was an unruly problem.

During this tweaking process, Laura and Robyn tried to get their heads around how to better structure and improve homework time on site. Laura communicated via text to teachers and Robyn adjusted the schedule to rotate volunteers and more teaching faculty to provide assistance. In year there, they improved processes to communicate to music teachers which of the 220 students needed to attend study hall. They also included processes to communicate to parents how much time children were spending in study hall. Despite these gains, the homework time still needed improvements. Parents continued to express this need at pick-up and through communications with Laura. In year three, site leadership decided to make a significant change by hiring a curriculum coordinator. Robyn made space in the budget because parents were expressing this need.

Needing transportation. ESO partnered with OKCPS to transport students to the Trinity International, but parents and guardians were responsible for pick-up transportation at the end of the day. For any family, transportation can be a complicated issue, but this may be especially in low income families or high poverty areas. If fact, transportation is noted as a limiting factor in the school selection process, especially for low income families (Ewing, Schroer, & Greene, 2004). By extension this same logic could apply to ESO, as families would be required to make arrangements to pick up their children at Trinity International Baptist, which in the case of Kaiser Elementary (the furthest elementary) is 3.8 miles or about a ten-minute drive without traffic or up to twenty with

traffic.

In years two and three, school mobility proved to become a pressing issue and threatened ESO's ability to serve families. Mobility is often pronounced in urban school districts (Kerbow, 1996) and has been linked to lower achievement (Mehana & Reynolds, 2004). Schools partnering with ESO have experienced high rates of school mobility (refer to Table 10, page 142). For example, in year one ESO serviced seven elementary schools, but through mobility this figure swelled in years two and three.

This issue of mobility challenged site leadership's core values of caring for the whole child. Witness my exchange with Dr. Raiber:

> **Interviewer:** Has school choice or school mobility affected things?
>
> **Dr. Raiber:** Oh yeah, it's been complicated. I mean this is another area of growth for us. You know, that first year we very clear with all the parents who come to me you know, if you choose to go to a school other than Taft, at middle school, we will not provide transportation and then we started to get some push because then we had 14 students I think at Bell Isle [an enterprise school].

Dr. Raiber noted that during the process of identifying students, site leadership was very clear that transportation would only be provided to district default district schools. This was to include default feeder schools such as Taft Middle School (Please recall, that first year the oldest students were in six grade, which is the last elementary grade in the majority of the district).

The majority of magnet schools do not provide bussing or at best it is very limited. Bell Isle Enterprise School, for instance, only provides four bus routes, which are intended to transport the highest percentage of students. Other families are responsible for their own transportation. As school choice enrollment for began for year

two, he noted they parents began to express transportation concerns to ESO. This was a problem. He continued:

> And it was kind of a pushback and forth for a little while. Finally, I said to Robyn we can't afford to lose fourteen kids and they can afford not to be here. We need to find a solution to this. So maybe it is time for us to step back from it and say okay maybe we can provide transportation.

In this quote, Dr. Raiber implies the parents were not about to budge. Presumably, Robyn was concerned with budgeting, but site logistics also posed a significant problem. Arrival times between busses can vary up to 45 minutes, and this affects study hall and first period courses. Perhaps, she was worried that acquiescing on bussing would set future precedents for parents to move more frequently within the district, which is especially problematic in a school choice district.

By year three ESO had grown to serve a high number of schools due in large part effects of school choice. While the exchange above between Dr. Raiber and Robyn focuses on these first 14 students, by year three the number of students attending alternative schools had grown significantly as represented in Table 16. Ten students were attending some for of charter schools, fifteen attended magnets, and 22 were enrolled in Bell Isle Enterprise Middle School. Thus, 23% percent or 47 students were attending a charter, magnet, or enterprise school.

Type of School	Number of ESO Students
Default/Public	152
Private	1
Out of District	1
Private Charter	1
Public Charter	8
Online Charter	1
Magnet	15
Enterprise	22
Total	204

Table 16: ESO Enrollment by School Type Year 3

Dr. Raiber's comment, "we can't afford to lose fourteen kids and they can't afford to not be here" is significant. On one hand, it speaks to the political capital families had in this instance. It also speaks to honoring the commitment to serve families. To some degree, this is also a commitment to educating the whole child. Ultimately, this logic won out. ESO provided bussing from Bell Isle in years two and three, with the caveat that it was temporary, though it still persists

ESO found creative ways to provide transportation for families that enacted school choice through attending charter, enterprise, and magnet schools. Table 16 represents transportation to the school site in year three. ESO provides transportation from the school site to 91% of their students (83% by bus and 8 % by van), thus only 9% or 18 students are responsible for their own transportation. Four of these are out of district and the other 14 have moved to schools that ESO does not serve. As a demonstration of its commitment to families, ESO continues to serve families who move out of district provided the parents are committed to getting them to the site.

Type of Transportation	Schools	Number of ESO Students
Bus	9	171
Van	2	15
Parents/Guardian	11	18

Table 17: Transportation to ESO Year Three

Central to research question number two, parents unified and mobilized to express strong resistance on the issue of transportation. It seems that ESO recognized parents' rights to choose school is in fact a fundamental choice in educating the whole child. It is beyond the scope of this research to examine whether school choice is increasing mobility rates.

Needing Information on School Choice. In most respects, Laura served as ESO's front-line decision maker fielding questions, making decisions regarding parental

communication, and in some cases even connecting parents to resources in the community. According to Michael Lipsky (1980) she was very much acting as a street-level bureaucrat in addressing the expressed needs of families. In our interview I asked her "What are some services that you help provide?" Said Laura, "You know, setting them up with clothing or meal services, or helping them job search. Helping them you know, like applying to middle schools like all these parents have no idea." This last statement warrants considerable attention, especially given the existing literature on parental decision-making and school choice.

Near the end the first year of operations, Laura had a parent ask her about middle school options for her sixth, going to be seventh grader. She recalls, "But honestly like most parents don't realize that you have to apply. They said so how does this work? Like what is this? I'm confused. I kind of swung by the school but I don't really know what it is." The experience of this parent echoes that of the research literature. In her research, Lynn Bosetti (2004) found "79% of public school parents rely on their social networks of friends, neighbours [sic], and other parents to inform their decision, teachers (59%) and school visits (43%)." In this instance, the parent took the initiative to conduct her or his own school visit, but was confounded.

It is this parent's next action that is noteworthy, which is reliance upon his or her newfound social network of ESO. Presumably, this decision was based upon positive experiences and trust gained through interactions with Laura and/or other staff. As Laura tells me this, my interest is piqued. She continues, "I think for so many families either they don't realize the application process or there is a language barrier…for them to not even have the knowledge of this possible advantage [to apply] it is a real shame."

Clearly, Laura sees the impact of cultural differences and social networks in the application process. To be fair, OKCPS does require school choice applications to be printed in Spanish, however it is unclear what language Laura is referring to here. While ESO serves a high number of Spanish-speaking families it also just blocks away from the ethnic enclave known as "Little Saigon" so this could be Vietnamese (Gross, 2007).

Laura also notes the roles of financial, social, and cultural capital acting as barrier to parents applying to charter, magnet, or enterprise schools. She tells me, "And the affluent, they have Internet at their house. They know how to find the information. They know the people to talk to figure it out." In just this one quote, Laura clearly lays out the financial, social, and cultural barriers families, respectively!

Laura also notes the moral responsibility for ESO to act on behalf of the families they serve. As someone attuned to issues of social justice with a passion to serve, she notes, "I think for us, we have to act in that capacity for the families that don't know." This is further evidence of ESO fulfilling their social mission.

ESO's relationships with public school sites proved critical in being able to provide additional information to families regarding school choice matters. Laura told me:

> There was a kid whose mom is trying to apply and she had a hard time, so I ended up calling the school and figuring out "Like, hey what's the deal." I talk to the secretary and figured it out. I said, "Thank you so much I'll be calling you back or would you email me?" She's saying "oh yeah, yeah I love you guys." And, these parents don't even have the opportunity."

Clearly, the relationship with the school impacted Laura's ability to advocate on behalf the parent. This is evidenced by the school secretary's comment of "Yeah, I love you guys." In effect, the schools share the same mission to advocate on behalf of students,

but they are not able to do it in the same way as ESO.

In this instance, we see ESO acting as an intermediary by facilitating the communication break down between parent and school. Berger and Neuhaus (1977) conceptualize mediating structures as institutions that stand between individuals and the structures of bureaucracy. Thought the secretary attempted to communicate with the parent, something went awry. Without ESO acting as an intermediary, it is likely this parent would have ceased her or his search. According to Ott (2001), "in a complex society such as ours, individuals need buffers—mediating structures—to help cope with large public and private bureaucracies when they are trying to get problems solved" (p. 33). School choice policy is difficult for parents to navigate (Bosetti, 2004)

This instance also illustrates the importance of the bi-directional view of capital advocated for by Yosso (2005) and others. While larger institutions such as public schools are more pluralistic, they tend to reflect the norms of the majority group, which in this instance involved email, newsletters, and the use of Internet. For the white-middle class these forms of communication are routine, but that is not the case for parents in lower SES classes, minorities, and those who languages other than English. And, while the school does seek to break these barriers, their efforts are limited. ESO, on the other hand, due to its strong ties and community involvement is seen as a resource. In essence, ESO is able to leverage cultural capital (language, values, communication strategies) and social capital (networks) in ways that public school is not.

When it comes to how parents hear about school choice, Laura tells me it was one of two ways. First and most frequent were the social interactions between parents,

which occurred at pick-up or concerts. Second, parents noted their children would often come to them because "Their ESO friends" were applying. I am a bit caught off guard by both instances of her plural usage, and it dawns on me that she may be talking about several families. I ask her, "How many kids are applying for school choice?" She replies, "I don't know. We gave packets to everyone." "Everyone,?" I say. "Yep, everyone," she's says plaintively. The packet Laura refers to is actually a succinct, three page information handout that includes an explanation of school choice, school-specific requirements and information, and deadlines and contact information for each school site. It is attached as Appendix G.

In her research Bosetti (2004) find that newsletters are among the lowest accessed sources of parental information regarding school choice at only three percent (it is actually tied with news media reports). In this case, however I would argue this method of communication was more effective, as it was hand-delivered to parents with a statement from Laura telling them to visit with her or Robyn if they had any questions.

ESO provided an opportunity for parents to mobilize around the issue of school choice. ESO also served as a means for parents to build what Putnam (2001) refers to as bonding social capital. Nonprofits may be viewed as political mechanisms that provide pathways for the local community and polity to organize, address community need, and potentially affect public policy. It has created a pathway for parents and guardians to collectively organize to address educational and social problems.

Relative Need

In this section, I examine ESO in terms of relative need, which is regarded as the

gaps between levels of services existing in community, as compared to another community or similar geographic area (Kettner, Moroney, & Martin, 2012). In order to accomplish this task, I examine music education across the OKCPS district to determine disparities in service. In particular, I note the availability of orchestral music education

For the duration of this case study research period (2013-2016), OKCPS offered "General Music" at all 56 elementary school sites in the district. In addition, eleven of these elementary schools offer some form of strings program, which include strings, Mariachi, guitar, and ukulele (R. Taylor, personal communication, March 22, 2017). Community resources and needs largely dictate these programs.

At middle school, disparities in music instruction across the district become more evident. There is some sentiment within the community that more resources should to be allocated to strings and band programs. Said one interviewee, "Some of our schools don't have string or band programs I think, or if they do, they're kind of like falling apart or whatever. Definitely, strings is [sic] not prevalent in OKCPS. I think there are only three programs." In fact, five of the twelve middle schools offer string programs, according the OCKPS Fine Arts Director (R. Taylor, personal communication, March 22, 2017).

Three of those five are served by ESO, and they all had strings programs prior to ESO beginning service yet only two of these were original feeder schools. The exception here is Bell Isle Enterprise School, which was addressed in the previous section "Expressed Need." It presents an interesting case, as it was not designated as an original feeder school. Parents expressed a desire for ESO to expand bussing services to this school and site leadership did.

Relative need was taken into account during the early planning stages. For example, even though Wilson Elementary was met the geographical criteria of service area, it was not selected as a school. Cathy notes, "We said a school like Wilson doesn't need to be included. They already have other connections to give those kids things, experiences, and music. We want to go to the schools that don't have as much but they are in close proximity to OCU." Thus, relative need and geographic location were both taken into account.

A critical factor in terms of relative need is frequency of instruction. Frequency varied greatly across both school sites and program years. As discussed in chapter four, this primarily hinged upon FTE allocations by the principal. Mrs. Gabbard, former Fine Arts Director notes that with the majority of spring and band programs students only go once a week, and that is not enough. Said another music education teacher within the district:

> I've been in the district for xx years and every decision is always regarding financial resources that are available or allocation. I have music once a week, so I'm always aggravated that my students are getting short changed with only one instruction [per week] where neighboring schools can have two instructions.

School districts are sneaky good at masking resource distributions across school sites (Rubinstein, 1998). During this period of budget tightening, the frequency of instruction was one means to mask inequality within the district. This teacher is referring to "General Music," which occurs in elementary school.

Normative Need

To review, normative need is that which is established by general consensus or society-at-large. As I have argued in this research, there is an inverse relationship

between the accountability movement in PK-12 education and the arts that is mediated by limited financial resources (Greene, 1995; Heilig, Cole, Aguilar, 2010). One could argue that, as a society, we have favored other curricula over the arts, thereby reducing exposure to the arts and orchestral education in particular. In my view, ESO and the broader phenomenon that is El Sistema Global and USA have a remarkable contribution to the concept to normative need. They seek to bring awareness to the importance to of not just music education, but a distinct type of orchestral music education that embodies creativity.

According to the Deweyian view of multiple publics, we may be wise to consider that ESO represents a certain public. Public discourse is an ongoing, recursive process. Educational agencies like El Sistema-inspired affiliates including ESO provide tangible examples of why we value the arts and what they seek to inspire. Mauss (1975), a sociologist who favors the functionalist approach, considers the role of innovation in dealing with social problems and social movements. Innovations such as new approaches to music education are necessary functions. Without them society would become stagnant and cease to serve its functional purpose, which in this case is to educate children. For me, this logic explains why ESO and the broader concept of El Sistema resonates. It reminds us of the values of music such as creativity, self-confidence, persistence, dedication, and fun.

So, Whose Need Is Being Served?

Through analysis, I have noted that all four forms of social need (perceived, expressed, relative, and normative) were met, but not from the outset. Although ESO came into existence in an undemocratic manner, through the perceived needs of the

founders and partnering institutions, I contend over time it actually served as a platform for community mobilization around the social mission of music.

In my view, this case teaches us that the concept of social need is complicated, especially in relation to this case. On one hand, ESO can be regarded as a philanthropic product. The founders set the object in motion with the express intent to fund the program for an indeterminable amount of time. However, as discussed in chapter seven, I came to find things were not so simple. Early in the process, other institutions in the community contributed to the notion of ESO and influenced its trajectory.

In their own ways, each of the community institutions contributed to ESO prior to its incorporation as a 501(c)(3) organization. Most often, the creation of nonprofits are associated with philanthropy, as opposed to charity. The former is derived from the Greek adjective philanthropos, which is composed of two words: phil—loving and anthropos—mankind (Friedman & McGarvie, 2003). The latter however, is commonly regarded as the voluntary giving of help to those in need without a strategic purpose (Dietlin, 2011).

It seems the founders' willingness to work through, rather than in spite of, local institutions problematizes whose need is being met. This research causes us to ask several questions around the needs of institutional partners. For example, to what degree are the school district's needs of increased student engagement or school-community relations being met? To what degree are the Wanda L. Bass's School of Music needs of extending its mission of the love for music to the local community being met? To what degree are St. Luke's (and Trinity's) needs of enacting a ministry being met?

Within the case, the effects of these community institutions are far-ranging. St.

Luke's United Methodist Church, which provided logistics and identity through employing the executive director and site coordinator. Together, they represent two-thirds of site leadership. As employees of St. Luke's, Robyn and Laura attended its professional development and were encouraged to instill St. Luke's values on site, thereby contributing to the identity and social identity of ESO. Dean Parker at the Wanda L. Bass School of Music at Oklahoma City University (OCU) has provided a host of resources to ESO literally viewing it as an extension of the school's mission. All three site leaders' offices in the school of music and resources are shared, including Dr. Raiber's Professorship. As discussed in chapters five and six, the culture of OCU has influenced ESO.

Through locating one-quarter of Robyn Hilger's, The OKCPS Foundation contributed to the mission of ESO. Her pedagogical views and understanding of the district proved critical in developing school-community relations and enacting the social mission of ESO. Trinity International Baptist, as the physical space of the nucleo, also influenced ESO though perhaps to a lesser degree the other key partners.

Through political mobilization, I demonstrated how the needs of ESO families altered the initial services of ESO, including transportation, increased study hall, and information on school choice. I treat these instances as need expression. I took care to demonstrate the thought processes around these events. Namely, Robyn and Dr. Raiber's commitment to families, as well as Laura's understanding of the bi-lateral forms of capital being exchanged at ESO, which stand in contrast to that of the school district.

In summation, the issues of expanding of study hall and transportation, as well

as the expression of information of school choice, are testament of parents mobilizing around issues central to their daily lives. Though these were not in the initial purview of ESO's mission, they came to address these needs when expressed. Furthermore, we see Robyn, Dr. Raiber, and Laura advocate for and work to empower ESO families.

ESO is a vibrant, dynamic nonprofit that represents a unique form of education. It is continually meeting multiple forms of needs, often concurrently. It was bourn out of both perceived and relative need, and shaped through expressed needs of the public it serves. Given its increasing notoriety and refined messaging, ESO may challenge the broader community to consider it or other alternative forms of education as issues of social justice.

Contributions to Future Research on Social Need

Future research examining social need or need in community settings may find it a worthy endeavor to pursue what needs are being met. As noted in chapter two, the assessment of what need is being addressed through ESO is beyond the scope of this research. An agreement of site access was that I would be unable to distribute surveys to parents/guardians and children. Future community-engaged research such as this, may consider examining what need(s) alternative forms of education are meeting. For instance, the felt or perceived need of ESO founders and leadership may vary widely, as compared the felt or perceived need of parents/guardians of children in ESO.

Hypothetically speaking, ESO founders and leadership may have perceived a high quality music education program as a need for children tin the community. Whereas, parents/guardians may have enrolled their children because they perceived the program was high quality after school program. Throughout this research, I have made

some tentative assertions surrounding the concept of which needs may be in play. For example, in chapter six I noted my interaction with John Hinds, a parent whose child participates in ESO. He intimated that lack of educational options was an important factor in parents' initial interest in ESO. Further, this view of relative need is triangulated by participation rates at Edgemere Elementary, the community school that has a host of convenient afterschool options. There, only three children participate in ESO. John notes that through participation and awareness, parents/guardians come to appreciate the benefits of El Sistema.

Chapter 8: Implications of the Case

In this chapter, I examine implications of the case. In my view, there is much we can learn from this case. Thus, implications are far-ranging. To some degree, implications relate to the instrumentality of the case, as I have examined it as an illustration of the larger phenomenon of the defunding of music education in PK-12 schools. Yet, this case also has significant policy implications. Throughout this chapter, I engage in reflexivity, in particular how my engagement with the case has altered my views of community problem-solving, defunding of civil services such as education, political mobilization, and policy at the community level. In many ways, the implications of this research spurn more questions than answers. This is a primary aim of inductive, qualitative research such as this, according to numerous researchers (Cresswell, 2012; Marshall & Rossman, 2006; Stake, 1995).

A Model of Community Problem-Solving

One lesson this research taught me is that places like ESO provide space for particular groups of people to come together and solve problems. This view is commensurate with Van Til's (1998) conception of civil society as PECTS (politics, economic, culture, and third sector), which has been evident across a wide range of actions. For example, the founders', who possess enormous financial and political capital, coalesced actors within institutions that also wield considerable power (OCU, St. Luke's, OKCPS, and OKCPS Foundation) around their perceived need for an El Sistema program in Oklahoma City.

At the outset, parents and guardians possessed little leverage in shaping and influencing ESO to reflect their needs. However, over time through creating of a shared

culture of orchestral music education parents and guardians were able express needs in a deliberative manner. While initially the possesses little leverage and capital, they politically organized and expressed needs by pushing back on ESO leadership for transportation needed as result of school choice, and homework time.

It appears that ESO board and leadership initially held strong positions on the limit of the transportation budget and holding the line on music instruction time on site. However, after parents and guardians exerted their own social capital through organized protest. Given common ground on the well-being of children in the program, both parties (leadership and parents/guardians) came to agreement According to Putnam (2001), this illustrates bridging social capital, which is essentially bonding between heterogeneous or diverse groups. Thus, this case illustrates a form of community-problem solving.

This deliberative process highlights Weick's (1976) view of loose coupling because ESO exhibited nimbleness in responding to parental needs. In these processes, both groups listened, learned from each other, and ultimately negotiated effective resolutions. Similar activities are evidenced several more times. Instances include, having teaching faculty drive church vans when bus service was not available, creating a formalized study hall through the creation of an academic coordinator and recruiting OSSM (Oklahoma School of Science and Mathematics) students to serve as peer mentors.

Getting Into the Fabric of Schools

Over the course of data collection, I witnessed several instances in which interviewees or persons on site questioned what could be next steps for ESO. This is

due, in part, to the entrepreneurial nature of the founders' and uncertainty of how big ESO would become. Consistently, people wondered whether the social mission of music, as witnessed in this case, could be transported or woven into other forms of education? I asked Dr. Raiber what his vision for El Sistema Oklahoma was in three to five years. He responded:

> Gosh. That's changed so much, and it continues to change. I would love to see us operate as an independent school. I really would. The more and more I look at that, the more and more I think that that's a necessity. I would love to see it operate more like a magnet in a public school setting. You know, or we could make those connections. I do know that we've got to get El Sistema worked into the fabric of public education. So, for me there are two parts of that. You know, as a public educator, if we continue to provide these experiences for these students free of charge to the school district, they will let us do that.

Presumably, Dr. Raiber feels El Sistema is important for all children because he has witnessed how the philosophy works. As a music educator who understands the transformative power of music, he likely feels a moral obligation to expand this opportunity to other students in the district. This speaks to the issue that lack of opportunities in music education across OKCPS and beyond is a matter of social justice. Music education occurs one a week in some elementary school sites, as described early by a music teacher, illustrates gross inequalities in music education.

Dr. Raiber considers two options for working El Sistema into the fabric of schools, which speak to discussions I have witnessed between him and Robyn. The first argument is to become a magnet or some other form of public education. The benefit here is to serve more kids. The potential expense, however, is to submit to accountability. While not mentioned by Dr. Raiber, an alternative to this option would be to become a private school (either through charter or tuition). Becoming either

magnet or charter would entail consequential curriculum expansion including science, mathematics, etc. He continues:

> I would love to see how an entire school would operate under an El Sistema philosophy or at least under our El Sistema philosophy. I would love to see how that school would operate because I think it would be a very, very special place. But, I think about that that just scares me to death….equity and public funding and all kinds of issues that come into that.

Theoretically, ESO could do this, but to what extent would El Sistemaness be lost? Such a task would be oxymoronic in a way, because instead of having the arts added to other curricula, it would be vice versa. Other curricula would be added to the core values of the arts.

The other argument made by Dr. Raiber is for ESO to continue as is and possibly affect school policy. This raises the question, how much can ESO affect public school policy? The answer, I fear, is not much. As long as we, as a society, narrowly view public education, we will fail to recognize the significance educational institutions like ESO and they will stand as outside the norm. To some degree, this case fulfills Jane Roland Martin's (2011) call for researchers to examine the role of community structures in the matter of education. My hope is that this case engenders a broad view of education.

ESO: A Form of Political Dissent?

I thought this was an instrumental case of the defunding of music education in schools, but as I have reflected on the case, it has literally illuminated deeper policy issues occurring in community settings. As indicated by the title of this research, I consider ESO as a nonprofit form of education. In simple terms this accurate, but ESO illustrates a host of contradictions. It is a product of perceived needs, but has evolved

through need expression of the community members it was intended to serve. Given the PECTS acronym in which this study is situated, I examine policy implications across the different domains of literature represented in chapter two.

Throughout fieldwork, I came to the gradual recognition that ESO is a school, in the sense that has grown into a community institution that seeks to socialize and educate. Further, corollaries to PK-12 schools abound. Robyn and Dr. Raiber act as administrators, Laura acts as a school counselor or community liaison by handling the bulk of parent-school contact, staff teach, and so on. Interestingly, the view of ESO as a school was corroborated by non-educators who have seen ESO in action such as Cathy and Tobin, the pastor at Trinity International. The key distinction, for me at least, is that ESO is a school form that serves a distinct public, rather than the broad public that we attribute to PK-12 schools.

To reiterate, Larrue, Varone, and Hill (2007)'s definition of policy is "a series of intentionally coherent decision or activities take or carried out by different public—and sometime private—actors…with a view to resolving in a targeted manner a problem that is politically defined as collective in nature (p.24). From the outset, I considered music education de-emphasis as the problem that oriented community members to ESO. I still find that to be the case, but the social knowledge creation gained through the mobilization of ESO is not static. Rather, as indicated by Larrue, Varone, and Hill's definition of policy, it is a series of decisions or activities by a public.

The convergence of political (mobilization of actors), economic (financial capital), culture (El Sistemaness), and third sector (ESO, as a vehicle) factors allowed for the emergence of a new form of a Deweynian Public emerging within the local

community. Thus, a significant contribution of this case study is that it demonstrates the evolution of civil discourse or PECTS over time through the ecological-political metaphor. Take economics for example. As noted in chapter seven, the founders' provided indefinite seed money with the expectation the program would become self-sustainable over time. The funding structure, as presented in Table 15 (Financial Diversification of ESO) demonstrates this has proven true.

Still, we are left with the question of what form of education does ESO represent. Surely, ESO is a form of orchestral music education, but it also represents an ideology of consciousness-raising for both parents/guardians and children who participate that is consistent with the views of Freire (1970). And though this is not a critical study, one could interpret ESO as representing of educational dissent or protest, as compared to schooling occurring PK-12 schools.

In this view, OKCPS administrators, principals, and OKCPS Foundation's investment of time and resources to ESO could be attributable to its ability to accomplish different educational aims than PK-12 schools. The two faith-based actors (St. Luke's United Methodist and Trinity International Baptist) could view ESO as a form of social action ministry (Jacobsen, 2001, Pierce, 1984). OCU, on the other hand, may be enacting a moral responsibility to the community, which is consistent with the views of academics (Benson, Harkavay, & Puckett, 2007; Moxley, 2013).

Implications for the Nonprofit Sector

Living in an Era of Defunding and Subsidization

Engagement with this case caused me to reflect on two deep, educational issues. The first is that defunding is not a static issue. The arts and other forms of education are

constantly under threat of being reduced. As scholar and advocate, I am feel a moral responsibility to advance the importance of the arts. As educator and citizen, this responsibility also extends to helping others discover the importance of other forms of education.

The second issue relates to defunding more broadly. As I write this (March 2017), the recent election of Donald Trump as president has emboldened efforts to defunding public services well beyond PK-12 education including the Affordable Care Act, National Parks, Planned Parenthood, mental health services, and government funded preventative programs such as Meals on Wheels. Defunding poses several risks, especially when we know that some of these services improve quality of life.

The case of Meals on Wheels is particularly important, as it has been demonstrated as a cost effectiveness tool (Graff, Adange, Vernooij-Dassen, Dekker, Thijssen, Rikkert, & Marcel, 2008; Thomas, Mor, 2013). Yet, the rise of alternative facts has called into question the nature of reality. For me, this places the onus on researchers and educators alike, to 1) relate our research to policy; and 2) find routes to disseminate our research through civil discourse. I further reflect on this issues in the following sub-sections.

The Ongoing Fight for Music Education. At this moment, there are scores of examples of defunding and limiting what have been deemed as public services. At the state level, for example, schools across Oklahoma have implemented previously unthought-of of policy actions due to dramatic reductions in state aid to PK-12 schools. Almost 20% of districts across the state have moved to a four-day school week, as opposed to five days (Stewart, 2017). Another recent policy change may directly relate

to the arts, thus it surfaced during my research. Witness this exchange between Dr. Raiber and myself:

> **Researcher:** With your knowledge and background and higher ed, how do you see what you guys are doing potentially changing PK-12 music education?
>
> **Dr. Raiber:** In the state right now, I mean we're looking at it and we're fighting some pretty hard battles. The Tulsa public just said, "We could eliminate athletics and fine arts and save several million dollars. My question is why was at athletics and the fine arts and not physical education and fine arts?" We're not talking about eliminating physical education that's essential. We're talking about athletics. That's not essential. Why the fine arts put in that same boat? Because we've treated it that way forever.

I recall the exact moment that Dr. Raiber said this. It immediately resonated with me. I have thought back to our interaction around this topic several times since then. As a result, this quote has become very important to me. For over a year, I have been slightly overwhelmed completing this dissertation. During that time, I have came to experience being bogged down in my research topic, which I have anecdotally heard is a common experience.

During the process, I inadvertently fell victim to thinking the problem of defunding of music education and other forms of education as static issues. Thus to some extent, I thought, "Well, I don't need to worry about the implications of the case so much, because funding is such a complex issue my research cannot possibly make a difference regarding that. I'll just write up some conclusions and be done with it." That being said, conducting this research and coming to understand the work of ESO compels me to wrestle with the implications of the case.

To Dr. Raiber's point, Newcastle Public School District, a suburban school district near OKCPS, enacted an "Athletics Fee" for 2017. The cost is $100 for the first

activity and $50 for the second activity, and any activity after that would be free. These costs are cut in half for students on free and reduced lunch program. (Stewart, 2017).

I have sought to untangle the dual problems of de-valuing and de-funding of music education. I consider whether we, as a society, have in effect already decided to limit the arts. What do democratic processes really look like? Does the public not fully grasp the importance of the arts, including creativity and the soft skills they help promote, as my informant John Hinds suggests? Is the fact that STEM (science, technology, engineering, and mathematics) education has permeated society evidence that the arts are no longer viewed as a common good. Has the proverbial, curricular ship sailed, so to speak? But, as I begin to question notions like this I get a bit of encouragement. Just recently a colleague introduces me to the concept of STEAM (the A represents the arts), which counters this claim.

The arts, just as all forms of education, need advocates. To some degree that is the message I feel responsible to convey. This case illustrates an ability to bring awareness of the arts to a certain public (families who have experienced the transformational power of the arts), during that process families and staff share experiences and build social capital, and as a result a certain community develops. I wish I could foretell how this "story" ends, but this research only spans three years. In three more years, the first students of ESO graduate from high school to embark on their next transformational journeys.

The Danger Looming Beyond Schools. In chapter two, I noted my approach to this research was a broad view of education consistent with that of Jane Roland Martin, Jerome Bruner, and John Dewey. I lamented the current narrow views of education as

occurring within the confines of institutionalized education. During the course of this research, I have considered how ESO partners with OKCPS, operates within the broader ecological environment of the state and local community, especially through the sociopolitical environment of education reform. And, while all these matters are true (and important), to a degree I too have fallen victim to viewing El Sistema Oklahoma too narrowly. In what could be the most recent example ever, I just framed the implications of the case within PK-12 educational policy.

Sociopolitical changes at the national level have compelled me to consider how this research relates to broader policy issues of defunding. One could argue, this research is essentially a case of the consequences (bad and good) of defunding public goods. Consistent with the views of the national organization "Americans for the Arts," Maxine Greene (1995), and others, I hold the line that the arts are a common good. Thus, unequal access to the arts could be regarded as a matter of social justice.

As a society, if we continue to defund or limit access to goods and services that have been deemed as public goods we may see more El Sistemas, at least I hope. Obviously, for me this is not the ideal. I would rather see the creation of music as a pervasive feature of society and I venture to guess that all actors associated with ESO would, also. But, clearly, this is not the case as budgets limit reality and democratic discourse is the means by which the Public (with a capital P!) arrives at a consensus. If we continue to defund the arts or, in the case above, subsidize sports in PK-12 schools, or beyond what are the potential societal implications? We already know participation in extracurricular activities contribute to positive identity formation (Feldman & Matjasko, 2005) and reduce high school dropout rates (McNeal, 1995).

Actors in the community may mobilize to address need and form nonprofits to fill in gaps, but as this case demonstrates, their actions are not democratic. In some sense, I view this case as a near-best case scenario of founders and actors representing key institutions in the community possessed a strong commitment towards advocacy of the arts and the needs of the community. Indeed, this case serves as an example of advocacy and passion that may become more relevant, as more publics mobilize around other social and educational issues.

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Appendix A: Observation Protocol

Observation Date _____; Observation Start Time _____; Observation End Time _____

1. Stakeholder presence:
    a. Which groups represented?
    b. Attitudes towards ESO?
    c. Interactions among stakeholders
    d. Parental presence
    e. Volunteers represent what organization (school, church, parental, higher ed)?
    f. Community groups represented
    g. Views of ESO as means of transformative music education

2. Social Capital
    a. Does ESO provide bridging social capital?
    b. Does ESO provide bonding social capital?
    c. How does ESO provide networking among stakeholders?
    d. Assess parental views of ESO as a neighborhood organization.

3. Cultural Capital
    a. How does ESO allow for leveraging of cultural capital?
    b. What minorities are represented?
    c. Differences between ESO's ability, as opposed to other organizations represented by case (school, church, higher ed)

4. Incidents
    a. Teacher handling of discipline
    b. How does it provide social capital or networking opportunities for families being served?
    c. How has your opinion of ESO changed over time?
    d. How could ESO improve?

5. Policy implications of ESO
    a. Stakeholder discussions on policy
    b. Teacher views of ESO in relation to other music education forms

Appendix B: Snapshot of Study Database

Method	Transcribed	Type	Title	Date	Duration (hours)	length (single-spaced)	Brief Note
Participant observation	yes	P	ESO #1	9/22/15	3	2	
Participant observation	yes	P	ESO # 2	9/29/15	3	3	
Interview	yes	I	Interview # 001	9/30/15	2	14	
Participant observation	yes	P	ESO # 3	10/6/15	3	4	
Direct Observation	yes	M	Prof. Dev. #1	10/13/15	2	5	

Key for Type:
P Program
I Interview
M Meeting

Appendix C: IRB-Approved Informed Consent Form

University of Oklahoma

Institutional Review Board

Informed Consent to Participate in a Research Study

Project Title: El Sistema Oklahoma: A case study in understanding an emergent, interorganizational form of music education occurring in a nonprofit setting
Principal Investigator: Brent Sykes, M.Ed
Department: Educational Leadership and Policy Studies

Signed Consent to Participate in Research

Would you like to be involved in research at the University of Oklahoma?

I am Brent Sykes from the Educational Leadership and Policy Studies and I invite you to participate in my research project entitled *El Sistema Oklahoma: A case study in understanding an emergent, interorganizational form of music education occurring in a nonprofit setting*. This research is being conducted at El Sistema Oklahoma (ESO). You were selected as a possible participant because you may be knowledgeable in the development, formation, or implementation of El Sistema Oklahoma. You must be at least 18 years of age to participate in this study.

Please read this document and contact me to ask any questions that you may have BEFORE agreeing to take part in my research.

What is the purpose of this research?

The purpose of this research is to understand the underlying factors in the creation of ESO, what stakeholders seek to achieve collectively, and its social implications.

How many participants will be in this research?

About 32 people will take part in this research.

What will I be asked to do?

If you agree to be in this research, you will participate in a one time interview.

How long will this take?

Your participation will take approximately one hour.

What are the risks and/or benefits if I participate?

There are no risks and no benefits from being in this research.

What do I do if I am injured?

If you are injured during your participation, report this to a researcher immediately. Emergency medical treatment is available. However, you or your insurance company will be expected to pay the usual charge from this treatment. The University of Oklahoma Norman Campus has set aside no funds to compensate you in the event of injury.

Will I be compensated for participating?

You will not be reimbursed for your time and participation in this research.

Who will see my information?

In research reports, there will be no information that will make it possible to identify you. Research records will be stored securely and only approved researchers and the OU Institution Review Board will have access to the records.

You have the right to access the research data that has been collected about you as a part of this research. However, you may not have access to this information until the entire research has completely finished and you consent to this temporary restriction.

Do I have to participate? No. If you do not participate, you will not be penalized or lose benefits or services unrelated to the research. If you decide to participate, you don't have to answer any question and can stop participating at any time.

Will my identity be anonymous or confidential?

Your name will not be retained or linked with your responses unless you specifically agree to be identified. The data you provide will be retained in anonymous form unless you specifically agree for data retention or retention of contact information at the end of the research. Please check all of the options that you agree to:

I agree to being quoted directly. ___ Yes ___ No

I agree to have my name reported with quoted material. ___Yes ___ No

I agree for the researcher to use my data in future studies. ___Yes ___ No

Audio Recording of Research Activities To assist with accurate recording of your responses, interviews may be recorded on an audio recording device. You have the right to refuse to allow such recording without penalty.

I consent to audio recording. ___Yes ___ No

Who do I contact with questions, concerns or complaints? If you have questions, concerns or complaints about the research or have experienced a research-related injury, contact me at brentsykes@ou.edu or 405-912-9018. You may also contact my faculty advisor, John Covaleskie, at jcovales@ou.edu or 405-325-5060.

You can also contact the University of Oklahoma – Norman Campus Institutional Review Board (OU-NC IRB) at 405-325-8110 or irb@ou.edu if you have questions about your rights as a research participant, concerns, or complaints about the research and wish to talk to someone other than the researcher(s) or if you cannot reach the researcher(s).

You will be given a copy of this document for your records. By providing information to the researcher(s), I am agreeing to participate in this research.

Participant Signature	Print Name	Date
Signature of Researcher Obtaining Consent	Print Name	Date
Signature of Witness (if applicable)	Print Name	Date

Appendix D: Semi-Structured Interview Schedule

Subject Number _____
Interview date _____

Start Time _____ End Time _____

1. Demographics/Background information
    a. Institutional affiliation, if applicable _____
2. Please tell me about yourself (background)
    a. life experiences
    b. community involvement
    c. educational history
    d. involvement in previous community educational efforts
3. How did you come to know about El Sistema Oklahoma (ESO)?
    a. What is your understanding of the purpose of the El Sistema Oklahoma?
    b. In what ways may this purpose be different from the institution you represent (if applicable?)
4. Please tell me about your involvement in ESO.
    a. How was it initially funded?
    b. How is it funded today?
    c. Did ESO have community support?
    d. How did your institution become involved (if applicable)?
    e. How are you connected to the community being served?
    f. Why did you choose to support ESO, as opposed to another community program?
5. Have you attended the program site? If so:
    a. What surprised you the most?
    b. How was it like you expected?
    c. How was it different than you expected?
6. In your opinion, what are some of the most important features of ESO?
    a. How does it provide educational opportunity?
    b. How does it provide social capital or networking opportunities for families being served?
    c. How has your opinion of ESO changed over time?
    d. How could ESO improve?
7. Whom else should I contact to interview about the development, implementation, or future of the ESO)?
8. Please tell me about 2-3 critical incidents that ESO has faced?
    a. How did you come to find out about this?
    b. Why is this important to the story of ESO?
9. Is there anything else you would like to tell me about ESO?

Appendix E: Sample Field Note

Date: 10/16/15

Time: 7:15 to 9:30am

Length: 2 hours and 15 minutes

Location: OCU OKMEA Esperanza Performance

Guiding Questions:

- RQ1 (*What can stakeholders achieve through their participation in ESO that not on own)*
- RQ2 (*ESO as a mechanism for stakeholders to address music education)*
- RQ3 (*What are the educational policy implications of ESO, as a case study?*
- Sensitizing Concepts:

  Interorganizational Field
  Ecological-political metaphor
  Cultural Capital
  Social Capital
  Nonprofits as low barriers
  Social mission
  Multiple educational agency
  Mediating structure
  Normative need

I arrive at 7:30 am for the OKMEA Esperanza performance. As I understand it, this performance may present challenges to ESO staff/faculty, so I am interested to see how things develop. The kids have been on fall break for about a week, so how many will show up? I found out that Laurs has verified who will be in attendance and they anticipate 5 out of 62 who are in the orchestra.

I walk up to the grand entrance of OCU's school of music on a crisp, calm October morning. Time has yet to change, so the sun is just coming up opposite the entrance. It is a beautiful morning. Robyn is standing at the base of some 30 steps. She is well-dressed, as if she were attending a professional recital. She is on her phone checking emails it seems with a coffee in hand. I greet her and she seems excited, but not nervous as she is no doubt used to therese performace (maybe ESO has had 15-20 y now). One thing is different, however this is the first time the kids are performing in front of a group of professional music educators. I ask Robyn how this unfolded and she tells me:

Robyn said she arrived about 6:30 (30 minutes before arrival time) because she anticipated some to arrive early. The first came around 6:45. Robyn asks if I can wait on

kids, while she goes inside to check on how things are going. This exchange demonstrates how on program-heavy outfit with little staff such as ESO I can't really be simply a observer. They need me to act as a volunteer in some capacity. Thus, I view myself as a participant observer. In a typical observation I will interact with several kids. Help with food service, monitor the halls, help with homework, provide discipline when needed, as well as simply checking in with kids and being kind, which is also synonymous with the core values of ESO and its social mission. They simply love on and care about kids and want them to know that.

Another volunteer, xxxxxx, comes outside and we visit. I will be interviewing her in coming weeks. Her husband is a bishop and she has been and ESO volunteer since year one, I believe. She mans the arrival deck and I head inside.

Things are bustling, there are several well-dressed professional manning a registration booth for the OKMEA conference. Down the hall to the left are a mass of kids in jeans, shorts, and khakis sporting ESO shirts that are a host of colors. In fact, the colors are as diverse as the kiddos that wear them. The colors are yellow, red, purple, blue, black, etc. While skin colors range widely. I see Laura sitting criss-cross apple sauce with papers spread out, her laptop open to an excel spread sheet, and two cell phones in front of her. I find out that she is tracking down the five or so missing kids. She is engaged on her phone and somewhat flustered. Most of the kids have finished their breakfast of muffins, apples, yogurts, and waters. I see six bankers boxes of music folders. They are nearly empty sans the kids that have yet to arrive (only 6 or so) and the ones out.

There is a narrow hall with the door propped open. This is where most of the kids voices are emanating from. I head down the hall and see kids unpacking instruments all over. They litter the 20 x 30 space. It is almost tuning time (which was to begin at 7:20). Dr. R appears from the stage (which is adjoined to this holding area of sorts) and asks the kids to move their cases and clear a walkway. The kids are social! Perhaps it is because they haven't seen each other for about a week. I ask several how their breaks are going and we joke about them sleeping late. They file out to the stage. Some of the kids are playfully chasing each other with instruments and the faculty don't seem to concerned about it. I guess this comes with the territory for kids aged 7-13 or so. Let them have some fun! Faculty from each area (brass, woodwinds, etc) begin to do tune ups. I help kids clear the holding area and head back to the registration area.

There are only two clarinet players in this orchestra. They knew one would be out who is sick and the other isn't here, so Robyn runs to her house to get her clarinet just in case she has to play.

Laura has checked on the status of the kids. Three kids are on their way and she will need to drive to go and get two more. She asks me to wait on the kids outside. I get outside and a boy arrives. He fumbles out of the car, and the driver sits there for about 20 seconds. It occurs to me that he may have a question, so I walk up. The man is waiting curiously. It seems like he doesn't know what to do. Upon approach, I can see that he is elderly and Hispanic. I say good morning and it is apparent that he doesn't

speak English well. He tries to ask if parents can attend the concert. This hadn't occurred to me. I know a core value of ESO is that parents and families are to be exposed to everything the kids do, still I am not sure in this case (see accompanying reflective note, as I discuss this). I think this would b okay, but I am not sure how much space there is and if parents are, in fact allowed. I explain to him that I am going to check the time, and I quickly text Laura (this is the common form of communication at ESO. Staff and volunteers are asked to text Laura for clarification on issues.) I hope to receive a response, but seconds turn into minutes.) We smile awkwardly and try to make conversation about the nice weather. Impatiently, I tell him yes that parents are welcome to attend. The concert begins at 9, so he may want to arrive at 845.

Another student, xxxxxx an African American boy of about 8-9 arrives. I welcome him and take him inside. I ask him about break and we make some small talk. As I return inside, I note the kids are still on stage tuning their instruments. I see Laura and ask if parents can attend and she says "of course." Good. Robyn walks in with her clarinet in its case. Laura reports that the clarinet player (xxxxxx) is on her way. Laura has not left yet to get her two kids. Robyn is relieved. There is a quick discussion of what to do with the remaining food. They consider providing it for the OKMEA group, but decide to retain it in case our ESO kids want a second breakfast before the performance. Laura is packing up her pseudo-workspace and Robyn asks if I want to accompany her to the ESO site (three blocks away) to get extra t-shirts. Evidently, a few of the kids did not come with the proper attire. We all three leave and leave the kids tuning their instruments with the 14 or so staff there. Note: there are approximately 32 staff, but this is only one of the three orchestras, hence the number of staff present.)

As we walk across the parking lot, I ask R how this performance came to be: She explains that the first professional organizational presentation of ESO was 1/15 at OKMEA. This was a peer-reviewed proposal [I have a copy of the power point to see how it was portrayed]. Robyn presented. It included demographics, mission, processes, and procedures. It may have included some preliminary data but I am not sure. Mike did the same power point presentation 2/15 at the Texas Music Educators associations. It is important to note that this is the professional development organization (OKMEA) to which Robyn has belonged to a long period of time, and Mike was the past president. As the host institution, the organizer (she specifically cites Mark-Dean of OCU school of music) chooses the opening performance. Mark was one of the key stakeholders to organize ESO with the Buseys, and he chose ESO. R explains that Mark doesn't charge OKMEA or similar organizations, because he likes to bring people to the college.

Three blocks go quick in a car, so we are there. Robyn opens the front or side door of ESO. It is strange to see the room set up differently. The chairs, which are moved 3-4 times during a typical ESO day, are set in pews probably from a church service (today is Thursday). More importantly, it is dark and there is no activity. In fact it is eerily quiet, as compared to an ESO day. Gone is the makeshift front desk and some 220 badges with red lanyards that kids file in to pick up to track their daily presence. The 14 or so round table for snack are stacked neatly in the corner. We head up the main stairs to and through several classrooms to a storage closet of sorts. We begin shuffling

through poorly labeled file cabinet drawers for shirts (e.g., yellow youth small, adult blue large) to find the two sizes we need. Surprisingly, this takes up to five minutes. R receives a call from L, but when she answers she's already hung up. She tries her back twice and no response. She thinks that maybe L needs another shirt, so we grab a few more. My pessimist side comes out and I worry maybe Laura ran into trouble at a family members house, hence the call. But R doesn't even seem to resist this, so I dismiss the thought.

As we have the shirts and are walking back down the stairs on our way out, I ask her how if PD (professional development) went like she expected, over the past few days. She thinks it went well, but it is a challenge to have staff take the reigns on issues and "figure it out." She is echoing R. Raiber's concern from yesterday. She notes that her leadership style is very different from his. Robyn's mom was a school counselor and everything in her house was negotiable, whereas Mike grew up in a military family and when someone said jump, he would say how high (his own words from PD yesterday). As we are arriving back at OCU, sensing some uncertainty in her approach, I tell her that she did great in PD, which I believe to be true. Specifically, I cite her approach to have Ryan Robynson (teacher-leader role) to discuss how his area (brass, I think) handles remediation and help. R states that maybe she was harsh when saying that she gets so frustrated when three weeks before a performance she works with a kid and he or she can't read the notes on the sheet music. Rhetorically, she reiterates her point from yesterday: "I just can't see how we get to that." She notes is not acceptable. Additionally, she thinks that pull out remediation is the last resort. "What makes us unique is that we have the ability [capacity] to be proactive and make adjustments based upon their skill level."

We arrive at the building and Deb is still manning the front. R heads inside and and I wait for our last kiddo () to arrive. Just a few minutes later, she does. Her mom is very apologetic for being late and or looks embarrassed. I tell mom it is okay, and try to assuage by telling her I was the last adult to arrive and she hasn't missed anything. We walk up the stairs and talk about her break. We go into the same narrow hall, as tuning has turned into practice. teacher and R greet her pleasantly and tell her how great it is to see her. It is noteworthy, that there is zero admonishment for tardiness, but rather it is we've missed you and we're so happy to see you. sees the kids all practicing and becomes very upset. From the distance I am at, I can't tell if it is nerves or embarrassment. Regardless of which, R embraces her and jokingly tells her that she is so glad she is here, so that R doesn't have to play (and she hasn't practiced in weeks). This seems to hit the spot and regains her composure and heads onto the stage. I notice L is back also. She tells R that she had to turn around after getting the first kid because he/she didn't have her instrument and she was calling R to tell her she was going to be later than expected. She got both of the kids and one of them was with someone else other than their parents/guardian, but I couldn't hear this conversation because it was private and muffled.

I am back, side stage watching the kids about to complete warming up the current OKMEA president xxxxx comes on stage to welcome the kids. He thanks them for coming and says everyone is looking forward to the concert. Next, Robyn comes next to me. She tells me to look under the kids orchestral seats. I do and see a small envelope and fun size Hershey's chocolate bar under each. She tells me that M has written all of the kids a note and given them a bar. Further, she tells me that I may want to ask a kid to see their note. Soon thereafter, the kids are dismissed. Hurriedly, they all run towards me, as if they've maxed out their concentration and are ready to run. A quiet boy that I don't know well stops near me and examines his letter. He asks me what it is and I tell him he should open it. He does and examines it cautiously. He looks flustered. He continues to question me as to what it is and I tell him it is a personal note. He says from who and he says he can't read the handwriting. I am unsure how to handle the situation, so I ask him if he'd like me to read it and he says yes.

The card is about 5 x 4 outlined in teal and says "just a note" in the center on the front and has a full music note above the lettering. It flips open vertically. Inside it says, "Brian – I love how engaged you are in every rehearsal. Keep asking your great questions! Thanks for being here today! Dr. Raiber I a very surprised that Brian seems unimpressed. I am shocked. I am unsure whether he is frustrated that he can't read it or if it draws out something else. Dr.R completed approximately 60 of these!

I enter the foyer and the kids have been moved over to a large area of the building around the staircases. For the time being, it is serving as a holding area of sorts. Kids are trying to quietly play tag, shuffling around and have naturally formed their own groups. Some are eating a second breakfast. About 3-5 staff are monitoring the stairwells and managing the kids by interacting with them. I join in. I see three kids on a bench and two are eating, the third is hanging out. I ask her if she is hungry and she nods yes. I tell her there is plenty. She says she doesn't want a muffin (what the others are eating) but looks hungry. I ask her if she wants to walk over to the food table and she says yes. We visit and she grabs a yogurt. I continue to interact with other kids.

It is about 8:50. Families are arriving and conference attendees are shuffling into the concert hall. There is a stark contrast between the two groups. Conference attendees are professional k-12 music educators and while they range in age, they are all dressed sharply. The majority are females and I would guess the median age is mid 40s. Families, on the other hand consist of parent or parents and there are often 2-3 kids in tow. They are dressed casually. It is interesting to see the start contrast between these two groups.

The kids have moved backstage and I mingle with staff and faculty. Brian indicates he printed 200 pages of the debut of the alietoric music performance piece titled "Kansas." They are tasked neatly on a podium at the concert hall entrance. They begin disappearing quickly as people pour in. Many stop and look and clearly cannot tell what this is. Regardless, many grab a copy. Before long, they are all gone which serves as evidence that attendance is more than expected.

I see R continually interacting with someone of importance. I make note to find out who this is. (At the end of the performance I ask L if it is Mark on a hunch(dean of music) and she confirms that it is). Everyone heads inside and I take a seat near the back. It is near capacity. I sit near what seems to be a music teacher, but there is no time for small talk as the concert is beginning.

xxxxx says ESO is a partnership between St. Luke's United Methodist and OCU. He notes they are on fall break and haven't practiced in a week and says they are "under the competent leadership of Mike Raiber." M takes the stage, faces the crowd and turns to the orchestra. I note that there is no introduction. Perhaps this is the format, but in this case it seems that R or someone should have given a proper introduction as to what folks were witnessing. I wonder how much people know or how familiar they are with ESO. They play a song I am not familiar with. I glance around the crowd and folks seem engaged. There are loud applause after the piece.

Two kids leave their seats and head to the microphone. Ah, they introduce ESO. First is Sophia Weaver, she explains they practice five days a week from 3:30 to 6pm at Trinity Baptist Church. She notes that no prior music experience is needed and there are no tryouts. The second boy

The next boy introduces their second piece of music which is Egmont's overture. He tells the audience about the piece. explains the next piece was conducted by two kids in the orchestra. He continues that they have a time called creativity and it was during this time that the composers came up with the piece. He explains that it was further developed in the orchestra, however he doesn't use the word ailetoric. They speak hurriedly on stage and their voices are muffled in the microphone. I think "how unfortunate" that they aren't clear. I look to R and L to confirm my view, but they seem unphased. Maybe I am thinking too much. They do convey that this next piece was created by students under the direction of Ms. xxxxxx and another teacher and is called Kansas. They note to listen for thunder and storm. Nonetheless, as I saw it being produced, I fear the audience won't fully appreciate it. I wonder if this is the risk of having kids introduce things, that being said it is effective to have them speak.

They begin to play and it seems that only a few people look at their piece of music discussing the paper. They play it and it is great. Afterwards, M has the student-composer group stand.

Two more kids come up. One tells about the program. Dr. Raiber steps over and says his speaking is unplanned but he wants to thank two more groups: ESO faculty and staff (R and L, both of which he gives proper praise). He asks them to stand and they are greeted with applause. The second kid introduces the next piece, which is Egmont's overture. He tells of the rebellion and that the piece represents the fight and death of the hero Egmont.

The kids being to play and it is going very well. About 1 ½ minutes in the stage lights go out! A ESO faculty on the front row jumps to action by moving backstage. The kids continue to play and don't miss a beat. The lights come back on in about 5 seconds. Unbelievably, this happens twice more and each creates a 2-4 seconds of darkness. The kids continue to play through it all. Once the piece is finally completed, they receive standing applause.

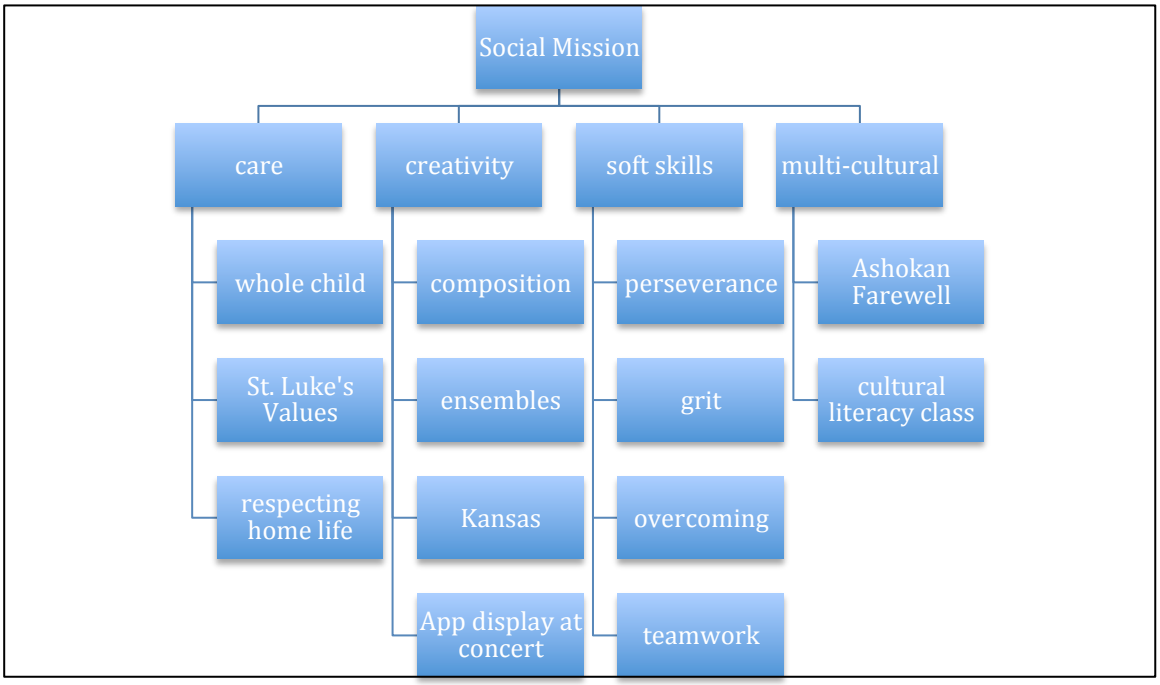
I am late to teach my 9:20 and I hurry towards the door. I see L and ask her about Mike Parker (dean) and we share an unspoken moment to express the awesomeness of the kids and playing through the dark. Outside the concert hall I see Mike and briefly introduce myself. He says he knows about my research. I tell him that I will be in contact in the coming weeks.

Note: in a previous conversation Robyn told me ESO was asked to open for the annual Creative Oklahoma meeting, which occurred in March 2015. This was a big opportunity for ESO. It provided exposure from the program in front of a new, connected crowd. Also, it gives the kids another opportunity to perform. At the root of El Sistema, Abreu contends that kids should be given every and as many opportunities to perform. He maintains this builds confidence for kiddos. Critics, however, view this as a blatant attempt to expose kids and receive as much publicity and funding as possible. It is easy to see that either perspective could be true, and at this moment my personal opinion is that it is a little of both. This is why this performance (OKMEA) was so interesting, at least on one level.

As far as Creative Oklahoma, Robyn worked with organizers to develop a time. It was tentatively set, but as the date approached the organizers changed the time and wanted ESO to open the meting, which meant that kids would have had to be there super-early, like 7am. This meant that parents would have been responsible to bring them on a school morning and ESO leadership (R, M, L) felt this was too much to ask and to taxing on kids and families. At least that is what Robyn told me. So, in this example the ethic of care seems to have outweighed the performance. This begs the question, of what made this performance different than Creative Oklahoma.

As for as logistics, I find out that several notes were sent home to parents/guardians informing them of the time of the performance and arrival. Even so, when Laura calls one of the parents they say that their kid told them he or she needed to be there at 9am.

Appendix F: Concept Map: Social Mission



1st Level: Theme

2nd Level: Category

3rd Level: Axial Coding of Nodes

Appendix G: School Choice Information Handout

Middle School & High School Option Information

The Oklahoma City Public Schools and our surrounding area offer many school options for families. El Sistema Oklahoma has compiled this information to help empower families as they make the best educational choices for their children. A listing on this document does not mean that ESO endorses any particular school or program. We simply provide this information as a service to our families. We have attempted to be accurate in listing where information can be found and deadlines that are known. Of course, this could change at any time, so we encourage you to follow up on this information with the school of your choice quickly to make sure you don't miss any information. Applications are available for download as noted or you may see Ms. Moon for a printed copy. Most choice schools require copies of report cards and test scores. You can provide these if you have copies at home. If not, you can ask your current school for copies. Don't wait until the last minute! If you have any questions or need any assistance, please let us know.

Regular Attendance Boundary Schools

For the majority of ESO students, Taft Middle School & Northwest Classen High School or Douglass Mid-High School are the regular attendance boundary schools. Your school boundary is determined by the location of your house.

To see what school your child would go to: https://sis.okcps.org/sips/OKCPS001.pgm

Enrollment: Enrollment will be done later in the school year through your current school. No extra work is necessary.

Transportation: Transportation via school bus is provided by Oklahoma City Public Schools to your attendance boundary middle school or high school. El Sistema currently provides transportation from Taft and Northwest Classen to El Sistema every day.

Choice Schools

Choice schools require submissions of applications and often require additional information like recommendation forms, test scores, and/or auditions. *The deadlines are very important!* Below you will find quick information about the choice schools in our surrounding areas. There may be more options than those listed, but these are the schools geographically close to your current locations.

Transportation to and from school varies depending on the school. El Sistema Oklahoma provides some transportation from some schools based on the large number of ESO families who attend certain schools. This varies year to year and is not guaranteed for choice schools.

Classen School of Advanced Studies—DEADLINE IS JANUARY 26!!!

Address: 1901 N. Ellison (19th and Classen)
Serves: Grades 6th-12th
Request an application from Ms. Moon or download at:
http://classenmh.okcps.schooldesk.net/
Additional Requirements:

- Application submitted by deadline of January 26th
- Two Letters of Recommendation from Teachers submitted with application by January 26th
- Copy of most recent report card or if going into 6th grade, copy of 4th grade and 1st quarter of 5th grade report card.
- Copy of most recent OCT/CRT/ITBS test scores
- Placement test for 6th grade applicants on January 30th
- Audition required for music students on February 5th or 6th—ask your El Sistema teacher to help you. You need one scale and 1 piece to play. This can be your child's current orchestra music.

Other:

- Learn about the school on January 19th from 4:00-5:30pm at Classen
- Some transportation is provided depending on where you live. Transportation to El Sistema Oklahoma IS currently provided.

Belle Isle Enterprise Middle School—DEADLINE IS FEBRUARY 19TH

Address: 5904 N. Villa (59th and Villa)
Serves: Grades 6th-8th
Request an application from Ms. Moon or download at:
http://okcps.belleislems.schooldesk.net/SchoolInfo/Admissions/tabid/71941/Default.aspx

Additional Requirements:

- Application submitted by deadline of February 19th
- Test Score/Grade Requirements: Total Reading – 740 OPI or above; AND Total Math – 740 OPI or above; AND a B average or above for grades 3-5. The school may make exceptions to these requirements. See application packet for additional information.
- Copies of 3rd, 4th, 5th grade report cards and copies of 4th grade test scores.

Other:

- 5th graders can visit the school on January 13, 20, or 27 from 10:30am-noon. Call 587-6600 to let them know your child is coming.
- Some transportation is provided depending on where you live. Transportation to El Sistema Oklahoma IS currently provided.

Dove Science Academy

Address: 919 NW 23rd (23rd just east of Classen)
Serves: Grades 6th-12th
Admission Information for next year not currently available. Check at: https://www.dsaokc.org/
Other:

- Transportation is not provided to or from the school. Transportation IS NOT provided to El Sistema Oklahoma at this time.

ASTEC Charter School

Address: 2401 NW 23rd (on 23rd between Penn and Villa/Shepherd Mall)
Serves: Grades 6th-12th
Admission Information for next year not currently available. Check at: http://www.astecharterschools.com/
Other:

- Transportation is not provided to or from the school. Transportation to El Sistema Oklahoma IS currently provided.

Continued

Independence Charter Middle School—DEADLINE IS MARCH 1

Address: 3232 NW 65th (65th and Independence)
Serves: Grades 6th-8th
Request an application from Ms. Moon or download at: http://www.icmsokc.com/

Additional Requirements:

- Application submitted by deadline of March 1
- Teacher Recommendation (form is in the packet)
- Copy of Attendance & Tardy Record from your most recent report card

Other:

- Students can visit the school on any Wednesday in January & February from 7:30am-11:30am. Call 464-4603 to register.
- Tour the school January 12 or February 9 at 6:30pm
- Transportation to and from school is not provided. Transportation to El Sistema Oklahoma IS NOT currently provided.

Harding Charter Preparatory High School—DEADLINE IS MARCH 4

Address: 3333 N. Shartel (33rd and Shartel)
Serves: Grades 9th-12th

Request an application from Ms. Moon or download at:
http://www.hardingcharterprep.org/

Additional Requirements:

- Application submitted by deadline of March 4
- Copy of most recent report card
- Copy of most recent test scores
- Math Recommendation (form is in the packet)—used for placement not admission requirements

Other:

- Tour the school on February 11 @ 7pm
- Transportation to and from school is not provided. Transportation to El Sistema Oklahoma IS NOT currently provided.

Harding Fine Arts Academy High School—DEADLINE IS MARCH 4 no later than 4pm

Address: 3333 N. Shartel (33rd and Shartel)
Serves: Grades 9th-12th
Request an application from Ms. Moon or download at: http://hardingfinearts.org/

Additional Requirements:

- Application submitted by deadline of March 4 no later than 4pm
- Three student essays
- Copy of most recent report card/discipline record/attendance record
- Copy of most recent test scores
- Math Recommendation (form is in the packet)
- Teacher Recommendation (form is in the packet)

Other:

- Tour the school on January 14 and February 4 @ 7pm
- Transportation to and from school is not provided. Transportation to El Sistema Oklahoma IS NOT currently provided.