

The Briarwood Ballet: An Artistic Expansion

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ABSTRACT

Synopsis: Briarwood Ballet in Birmingham, Alabama, was a non-profit organization that provided classical ballet and contemporary dance classes under a mission of spreading the Christian gospel through dance. In late 2015 Executive Director Peggy Townes was considering whether Briarwood Ballet should attempt to target a wider, more secular audience through additional performances. A move in this direction would have administrative, artistic, staffing, and financial implications. It could also heighten the tension between the religious mission of the organization and Peggy's desire to have Briarwood Ballet be viewed as a professional ballet troupe with quality equal to that of secular dance companies.

Research Methodology: This field case was written based on first-person interviews conducted over a period of four months (January to April, 2015) with follow-up interviews (October and December, 2015). These interviews were conducted both in person and over the phone, with follow-up information provided through email. In addition, Briarwood Ballet provided source documents, including financial, marketing, and administrative material. The case authors also used the company's external website (<http://briarwood.org/ballet>) as a source of information as well as secondary sources to gain insight into the overall industry and the Birmingham community. None of the information provided in the case is disguised.

Relevant Courses and Levels: This case would be most appropriate for capstone courses in strategic/general management for undergraduate students. It would also be highly applicable for specialized business courses in nonprofit management and arts management. It can be positioned early on in a strategic management course to help students get familiar with case analysis while focusing on the role of a mission in an organization. It is designed to be used in a 75-90-minute class.

Theoretical Basis: This case is focused on the role of mission and vision in nonprofits as linked to strategic analysis and planning. It builds on a number of theoretical models related to mission analysis and strategy creation as outlined in detail in the instructor's manual.

INTRODUCTION

Peggy Townes, executive director of Briarwood Ballet in Birmingham, Alabama, looked out of her office window into the adjacent studio. A dozen or so of the top ballet students stood in scattered lines across the floor, heads bowed, praying together for the rehearsal that was about to

begin. In just a few short weeks, they would be performing at the Briarwood Presbyterian Church's annual women's outreach—the 2015 Christmas Festival—with a choir, orchestra, and its own ballet concert.

Briarwood Ballet was a financially sound organization that was well supported by Briarwood Presbyterian Church.

Briarwood Ballet had almost 500 students in its ballet school and provided multiple opportunities for its top students to perform throughout the year. But still something was missing. Peggy thought, *I often feel like the Briarwood Ballet is a candle in a very bright room. If we were a candle in a dark room, I know we would be more effective and could make even more of a difference.*

While it would be easy to keep performing for its current audience, what Peggy really wanted to do was share the Briarwood Ballet experience with more people in its community, across the country, and even internationally. To accomplish this could require some big changes to its current operations, including expanding practice and performance spaces, increasing marketing, reconsidering the mix of amateur and professional performers, sourcing additional choreography, adding costumes and staging, and augmenting the existing ballet administration. For such an expansion to be successful, Peggy would need to gain the support of students, their parents, current instructors and ballet staff, the church, and the broader community. More importantly, she did not even know if such an expansion would be financially sustainable or even actually necessary.

Any expansion at Briarwood Ballet would require a lot of thought and research. Looking around at her cluttered desk and mounds of work to be done before the Christmas performing season, Peggy did not know where to begin.

BRIARWOOD BALLET

Briarwood Ballet was founded in 1980 by Peggy's mother, Barbara Barker, and began as a few small classes in a nursery room of her church, Briarwood Presbyterian in Birmingham, Alabama. By 2015, Briarwood Ballet had grown into a successful organization with almost 500 students, around 30 staff members, two performing student companies, and numerous performances throughout every year. Briarwood Ballet offered progressive levels of dance training starting for 3-year-olds up to high school students, providing classes that included creative movement, pre-ballet, classical ballet, and modern dance. In 2015, there were 463 students enrolled at Briarwood Ballet, weighted more toward the younger ages.

The emphasis on classical ballet, with additional classes for other forms of dance, had served Briarwood Ballet well over the years. It had put together its own curriculum, and every teacher implemented it in some way in the classroom. While the organization had considered going to the American Ballet Theatre (ABT) curriculum, it was not yet a decision taken by the Briarwood Ballet. Peggy commented,

“That’s a huge move, and it’s kind of something that we’re looking at slowly, but we haven’t completely adopted the ABT curriculum. We have had some training in that, but we haven’t full-force bought into it.”

Governance Structure

In the late 1990s Briarwood Ballet became a board-directed ministry of Briarwood Presbyterian Church. As a religious organization, the Briarwood Presbyterian Church was exempt from taxes and did not have to file tax returns. Briarwood Presbyterian Church had eight board-directed ministries, many of which had been in existence over 15 years. They were a unique blend of integrated church programs and separate nonprofit entities. All eight ministries were under the Session, or governing body, of Briarwood Presbyterian Church that set their pay scales and some of their organizational policies. Each of the ministries also had its own board of directors. The board of Briarwood Ballet assisted the organization in important decisions and helped with fundraising. Several of the board members of Briarwood Ballet sat on Briarwood Presbyterian Church’s Session, including the chairman of the Briarwood Ballet board, who answered to the Session for the ballet ministry and voted on behalf of Briarwood Ballet on issues that would impact its organization. Peggy reported and was accountable to the Briarwood Ballet board. Exhibit 1 provides the governance structure of Briarwood Ballet.

As a not-for-profit organization, Briarwood Ballet had a desire to serve all ages and talent levels within their structure and it saw the students’ spiritual development as more important than their artistic development. Some of the dance classes included Bible study. The organization’s mission came directly from its beliefs as a Christian organization: “Briarwood Ballet is committed to serving God by offering quality instruction in ballet and dance education within a Christ-centered environment.” Exhibit 2 provides the full mission statement of Briarwood Ballet.

The Staff

Briarwood Ballet employed 27 people, including 3 full-time and 24 part-time staff. Because Briarwood Ballet was a board-directed ministry, Briarwood Presbyterian Church set Briarwood Ballet’s salary structure. This resulted in wages much lower than competitive ballet schools.

Briarwood Ballet had three full-time, salaried staff members: an executive director, an artistic director, and an office manager. Peggy Townes had been hired as the executive director in 2012. One of the reasons she had been selected by the Briarwood Ballet board for this role was because she was a member of Briarwood Presbyterian Church. Peggy

had taken ballet as a student many years before, and she had taught preschool classes for Briarwood Ballet for 27 years. However, most of her experience came from the world of theatre. Prior to becoming Briarwood Ballet's executive director, Peggy had spent 15 years developing and running a children's theatre ministry. As executive director, Peggy was responsible for the organization in general, both in performances and the administration of the school. It was her job, with the approval of the board, to set the goals and direction of Briarwood Ballet and to work with her staff to implement those goals. She felt she still had a lot to learn about running the organization from a business perspective. "I'm not administrative," Peggy said. "I'm artistic."

Reporting to Peggy was the artistic director, Kenn Tolle. Kenn had been on staff at Briarwood Ballet for 15 years and was responsible for the artistic direction of the school and all of its performances. He was often invited to teach for other programs, and his connections allowed Briarwood Ballet to bring in well-known guest teachers and choreographers. The quality of Kenn's artistic work was a reason why Peggy thought they would be able to take Briarwood Ballet performances to a wider arts audience. Peggy commented:

Our greatest asset, no doubt, is Kenn Tolle. Kenn is gifted in every possible way that connects to a performance. He has a beautiful eye for design, for fabrics. He has an amazing sense of costuming and is an incredible choreographer. He and I work really well together because I love to tell a story and he loves to take my story and put it on stage.

The third salaried position was Briarwood Ballet's office manager, Lisa Allen. She had also worked at Briarwood Ballet for 15 years, so she knew her job well and was very efficient at what she did. Lisa described her position as "looking after all of the financial things, including all of the registration and the book-keeping and the gazillions of things that have to happen to keep things running smoothly."

Briarwood Ballet's other staff were part-time employees, who were paid hourly wages. The largest group of these employees was the teachers. In addition to Kenn, there were 17 dance instructors who reported to Peggy as employees and to Kenn for the artistic and technical direction of dance classes. Students in the highest levels also had the opportunity to be teacher's assistants. Some were paid wages directly while other students applied what they earned to their tuition balance. There were also part-time performance-based and administrative roles. Given the high number of performances put on by the school, Briarwood Ballet paid a part-time costume mistress. One of the teachers also served as a part-time office assistant, and Briarwood Ballet had a part-time manager for the supervised dressing room. There were a few other hourly wage assistants working in the supervised dressing room as well.

The parents of the Briarwood Ballet were deeply involved with the organization and created the backbone of the organization's volunteer base. Volunteers did everything from making headpieces to scanning tickets to working on the backstage crew. This reduced the number of paid staff required.

The Students

Briarwood Ballet students were an essential part of the organization and the school's primary source of revenue. About half of the Briarwood Ballet's students were members of Briarwood Presbyterian Church or attended Briarwood Christian School, and half were from the community at large; the majority of students came from Christian families.

The upper levels of Briarwood's ballet school (starting in fifth grade) were split into two divisions: the Intensive division; and, the Enrichment division. Exhibit 3 provides the progression paths of students through Briarwood Ballet.

Students were placed in the Intensive division based on faculty recommendation. Kenn explained, "The training in the Intensive division can be very demanding and is geared towards those who exhibit noticeable talent, the physical attributes required for professional dance, and a serious work ethic that would allow them to excel in classical ballet technique and pointe work." Ballet Exaltation was the performing group of the Intensive division and was made up of seven to thirteen dancers from the top level of the track. The group was run by Kenn and performed at Briarwood Presbyterian Church but also at external events, such as the Alabama Dance Festival and Samford University's Dance Concert. Its repertoire consisted mostly of Kenn's choreography and focused on classical ballets.

Briarwood Ballet created the Enrichment division for students who loved dance but would not necessarily be able to excel in a classical ballet environment and might become easily discouraged if they tried to rigorously pursue it. Peggy noted, "Although ballet training remains the core of this track, it is the goal of this division to expose dancers to a variety of dance genres, not limiting them by the strict physical requirements that classical pointe work demands." The Enrichment division's performing company, Immanuel, was run by teacher and former Briarwood Ballet student Meredith Dorough. While this group was about the same size as Ballet Exaltation, its performances were mainly for audiences at Briarwood Presbyterian Church and so required less practice time from its dancers. Its repertoire was more contemporary in nature. While the two groups rehearsed separately and had their own performances, they also danced many events together within Briarwood Presbyterian Church.

Briarwood Ballet worked to create among the students an internal culture of teamwork and gratefulness. Meredith observed, “These girls, instead of sensing that they are always competing with each other for parts, are working together as teams, and they perform and use that not only as personal worship and leading in worship, but they can present the Gospel in that way.”

Performance and Practice Venues

Because of its affiliation with Briarwood Presbyterian Church, Briarwood Ballet had access to free dance studios and performance space within Briarwood Presbyterian Church and Briarwood Christian School. Classes were often crowded in the afternoons and evenings with few time slots available to fit in additional classes should demand increase. Peggy remarked:

I think that probably one of the greatest strengths that we have is that our facilities, and this is huge, are provided. And because we have been given not just facilities but lovely, well-equipped facilities, we are able to keep tuition way less than half of a comparable program. I think the flip side of that is they’re shared facilities, and so we don’t have them at our discretion all day.

Briarwood Ballet held its performances either on the main platform in Briarwood Presbyterian Church’s sanctuary or at the Barbara B. Barker Fine Arts Auditorium at Briarwood Christian School. The sanctuary sat more audience members but did not have a very large stage area and had very few technical elements that could be included into the performances. Using this space cost the Ballet almost nothing. The auditorium at Briarwood Christian School did not have as many seats compared to other theaters in the area, but it had a good technical system for performances. Briarwood Ballet had used it for its spring performances for many years and was comfortable in the space. It did have to pay \$600 per day to rent the Barbara B. Barker Fine Arts Auditorium but were approved to operate the sound and light boards themselves.

Performances

Briarwood Ballet performed at many Briarwood Presbyterian Church events but also created many of its own performances. The Immanuel troupe had its own concert to showcase its company repertoire every year. Immanuel and Exaltation also had numerous opportunities to perform at other schools, churches, and events in the community. “We’re invited often to schools and other churches for performing opportunities,” Peggy said. “But we honestly have to limit those. We turn down a lot of opportunities.”

Both companies had taken missions trips abroad and danced internationally in Northern Ireland, China, Sweden, and Cuba. They were already planning to return to Cuba to perform in spring 2016 after being invited to do so.

The biggest event that Briarwood Ballet put on was its annual spring production. It involved every student in the school who were in third grade and above (the younger classes had their own separate recital) and took a lot of effort on everyone’s part to prepare. Kenn said, “Our final event of the spring, which is always the highlight of everybody’s year, is a story ballet that takes biblical truth or the Gospel itself and presents it in an allegorical tale. I think last year we sold over 2,000 tickets for that. So, it’s very well attended, and it’s another thing that defines us and sets us apart.”

In 2014, Briarwood Ballet had teamed up with Hosanna Sacred Arts, Kenn Tolle’s company, to create a unique concert opportunity titled “Thy Kingdom Come.” It brought in five professional dancers from different companies to perform with them. Kenn explained, “They were paid to be here, and we housed them, we gave them a stipend, we bought their pointe shoes, and then they also received a salary.” It was an opportunity for the students in Ballet Exaltation to dance with the professionals and have some new pieces choreographed for them. Kenn directed the whole performance and choreographed some of the pieces, and three other guest choreographers were brought in to stage new pieces as well. After nine days of very intense rehearsal, Briarwood performed the concert at Briarwood Presbyterian Church and also took the concert on tour, performing for other churches in Nashville, Tennessee, and Huntsville, Alabama. The performances were well received on the road and many people asked them to come back and dance again.

Current Audience

Briarwood Ballet had a loyal audience base that kept performances well attended. Kenn described the types of people who attended performances:

I think, probably number one would be the families of our current students. When you have 400 students plus, that’s a lot of parents and grandparents, and that will fill up an audience fast. I think the next level would be former families of students who have loved the ballet. And then the next level of that would be Briarwood Church members, because a lot of what we do is for the church, and you’ve got an automatic 4,000 more there. You put all that together and you’ve got a really large audience base.

Peggy wanted to reach beyond Briarwood Ballet’s existing Christian community to attract a new audience with

whom it could share its message. At first, she envisioned that audience being made up of people in the Birmingham community at large, especially those who wanted to support and encourage student artists. Eventually, she wanted to see overlap with arts supporters in the community, people who were already in the audiences of some of Birmingham's other professional arts organizations. This group was more artistically savvy than Briarwood's current audience and far more secular. Attracting them to Briarwood Ballet's performances could prove to be a challenge, but it would also be very rewarding.

Marketing

Briarwood Ballet's performances were well attended with little marketing required. Office Manager Lisa Allen commented on the marketing used by Briarwood Ballet:

We don't employ much [marketing] at all, to be honest. We can put an announcement in the [Briarwood Church] bulletin and we'll have a full house. So we do posters, flyers, and cards, and we have usually very beautiful printed material, but it's very expensive, and I don't know that it's really - it's not a lot of bang for your buck because those people are probably going to come anyway. It's a reminder, it's something for a scrapbook, but I don't know that it really gets us much of an audience. The last few performances we have tried to paper the town, just so that our name is out there. We have tried to take our postcards and our flyers and put them as many places as we can in as many areas as we can, and then we do mail-outs, but that starts with who is on our mailing list and the individuals on our mailing list are mostly members of our current audience.

Briarwood Ballet had a Facebook page, but it was used more as a community bulletin board than as a marketing tool.¹ It had also created three videos to highlight the abilities of students and the organization more broadly. The Briarwood Presbyterian Church had its own radio station, WLRJ, which advertised upcoming performances. Peggy had also looked into gaining coverage in the local press, but that had not been very successful. Peggy said:

Two years ago, when we were doing the *Lion, the Witch, and the Wardrobe*, I tried to get with *Over the Mountain Journal* and a couple of other periodicals here. And everybody seemed very interested and said they were going to send out photographers, but nobody followed through. And because you get so busy—we would love to do that, but we've got to have somebody that they'll respond to. And I don't know how you find those connections.

Revenue Model

Financially, Briarwood Ballet was a stable, self-sustaining organization. It had shown a profit over the past eight years and had accumulated surplus funds to protect the organization if it was ever to lose money on a performance or project. It worked to keep tuition affordable for students. Exhibit 4 provides a breakdown of tuition and fees for students.

Because its revenues came primarily from tuition payments, which covered its costs, Briarwood Ballet did not seek out donations and did minimal fundraising. Peggy said, "As of right now, we've never done fundraising, or not significantly at all. Our audience doesn't seem to want to give that way. They would rather put money in an offering plate than to click a button. I personally would rather click a button. So, we are trying."

Traditionally, Briarwood Ballet had not charged for any of its performances. Recently that began to change but more for operational issues than financial. "We knew that we had to go to a ticketed event," Kenn remarked. "It's gotten out of hand with people trying to save seats and getting there early, and then [we were] turning people away, which we don't want to do." By moving to a ticketed program, it could ensure that everyone who wanted to attend knew they would have a seat when they arrived. In 2015, Briarwood Ballet charged for its spring performance for the first time. Because its audience was used to attending every ballet performance for free, ticket prices were set at \$5. Peggy stated:

I think that \$5 was a nice round figure, and since it was the first time we've ever charged, we didn't want people to feel overwhelmed by that. We still had some complaints, because people said, 'We paid for ballet...' you know. My answer is, go somewhere else and find out what you'd have to do because I've been to their performances and their tickets were \$35 to \$40 each.

Briarwood Ballet purchased a software package that enabled them to both set up a web page where people could buy tickets online and give volunteers a mobile app at the theatre to scan the web-purchased tickets with their phones. Tickets sold very quickly with all of the main floor selling out online. Briarwood Ballet was able to use the ticket sales from the 2,000 tickets sold to cover the cost of the recital, which had usually been around \$10,000-\$12,000

THE COMPETITION

Briarwood Ballet's most direct competitors were the Alabama Ballet and the Alabama School of Fine Arts.

The Alabama Ballet was a professional ballet company that was well established in the Birmingham community. It

also had a ballet school connected to the company that was a member of the Royal Academy of Dance and used that coordinated syllabus across all its levels. Because this school was very rigorous and had the potential to feed into a professional company, it could provide its students opportunities to perform with professional dancers on a regular basis. The Alabama Ballet's professional company performed multiple times throughout the year; it was one of only seven ballet companies worldwide who were granted the right to perform George Balanchine's version of *The Nutcracker*. Since it was a professional company, the quality of its work was higher and also better known than Briarwood Ballet.

The Alabama School of Fine Arts (ASFA) was a public high school located in downtown Birmingham that let its students seriously study the fine arts for high school credit. Students had to audition for the school, but once they were in, they did not have to pay tuition since it was a public school. The hours used for class and rehearsals were much more flexible since ASFA could use its school hours in addition to the evenings. Recently, the school had completed construction on a new theater downtown, the Dorothy Jemison Day Theater, which was used for student productions and was also rented out to other arts organizations.

There were other, smaller dance studios in Birmingham, many of whom offered styles of dance that Briarwood currently did not, such as jazz and hip-hop. It also offered opportunities to participate in dance competitions which were becoming more popular. The whole concept of competition dance was fairly antithetical to Briarwood Ballet's performance philosophy. Peggy commented, "We're high on training before performance, and so I would say in the 5th grade until maybe 10th grade years, we lose some kids because their parents don't feel that they have enough performing opportunity here. We don't think they're ready for it."

Birmingham also had a number of other local arts organizations, including Arova Contemporary Ballet, Sanspointe (a modern dance company), the Red Mountain Theatre Company, the Birmingham Festival Theatre, Opera Birmingham, and the Alabama Symphony Orchestra. Briarwood Ballet competed with these organizations for consumers' entertainment dollars.

ARTISTIC EXPANSION PLANS

The success of "Thy Kingdom Come" and the integration of professional dancers into the company for that show made Peggy hopeful that her vision for expanding Briarwood Ballet's performances was feasible. To be successful, Peggy believed she would need to change the perception of Briarwood Ballet in the Birmingham community. Peggy noted:

I think the knowledge that we are part of a church—and a very conservative church, a very vocal evangelical church—is obviously going to be something in people's heads that will keep them from thinking that we are also [artistically sound]. I don't think that they would equate that with excellence in the arts because Christians have put out some bad art, you know, and bad dance. We've got to be seen to be considered viable.

However, the main goal of any proposed expansion would be for Briarwood Ballet to extend its influence under the organization's mission, allowing Briarwood Ballet to dance for people who had never heard or experienced its message before. Peggy thought about how a proposed expansion would support the Ballet's mission:

When we go back to our mission, we are "serving God by offering quality instruction...." So, actually, as far as that goes, it would only be under the "serving God" part [of our mission] within our Christ-centered environment. If we are serving God, we are not only sharing with those that we have immediate contact with and responsibility for, but teaching them how to share with others. And so, that would be part of that discipleship process.

Professional Dancers

While the technical staff for productions would often be provided by the theater as part of a rental agreement, the artistic staff would need to come from directly within Briarwood Ballet. Peggy did not need to think for long about who would be heading up these proposed performances. "I definitely see Kenn as being the artistic director of whatever we do," she said. As the primary choreographer for Ballet Exaltation, it would make sense for him to use the group for a part or all of the proposed performances. Peggy and Kenn were already considering bringing in professional dancers to perform with them, or even creating a professional company of Briarwood's own. Kenn remarked, "The fact that we use students and not professionals is definitely an obstacle because these kids have school, and that's a higher priority than their dance training." During the school year, students' practice and performance time was limited. Expanding the Briarwood Ballet to professionals would provide mentors and inspiration to higher-level students, but it could change the culture of the organization. This option would take two years to fully implement.

Creating a group of professionals would incur additional expenses. In addition to the professionals' salaries, Briarwood Ballet would incur expenses for travel, stipends, and pointe shoes. An option could be hiring professional

dancers on a periodic basis, much like it had done last summer with “Thy Kingdom Come.” This would be less expensive for the organization and would give one or maybe two of their performances that artistic recognition while still providing opportunities for its students to work closely with professional dancers. However, by only having professionals a few times a year, it would take Briarwood Ballet much longer to build a consistent set of performances and tours as well as enhance its reputation in the community.

The least expensive option would be for Briarwood Ballet to remain strictly a student group. However, this would limit the number of performances it could do and its artistic credibility in the eyes of its potential audience. Peggy stated: “If we weren’t to go with a more professional focus, our girls are pretty maxed out. So I think it could only be summer things that would take us in that direction. Maybe something outside of that, but their performance time is really maxed out.” There was always the option of cutting back on the amount of performing the students did at Briarwood Church and its ministries, but Peggy knew that would not be well received and wanted to avoid it if at all possible.

New Performances

Peggy envisioned new concerts as being fairly similar to what it put together in “Thy Kingdom Come.” The concert was a mix of both new and old pieces, choreographed by Kenn Tolle and three additional guest choreographers. Peggy wanted the proposed concerts to be roughly an hour and a half, which would be a lot of choreography for just one group of dancers to learn but could be feasible with two groups working side by side. It would be a blend of classical ballet and more contemporary dance. While the subject matter of the pieces in these concerts would probably be thematically Christian, Peggy did not believe it had to be explicitly Christian. It mattered more to her and Kenn that their faith was being expressed through artistically excellent works than that every piece be to Christian music or deal with specifically religious ideas.

New Performance Venues

While Peggy was interested in providing opportunities for Briarwood Ballet students to perform outside of Birmingham, her focus was to first attract a broader audience base locally and build the school’s reputation as a legitimate arts organization within Birmingham. This would also be logistically easier in the short-term.

There were a number of venues Briarwood Ballet could use in downtown Birmingham to expand the number of performances. The Alabama Theatre was a 2,500-seat, refurb-

ished theater from the 1920s in the heart of downtown Birmingham. It had a lavishly decorated interior and was a popular venue for musical concerts and movie showings. While not often used for theatre or dance, it could be used for that purpose. The rental for the theatre was \$5,928.99 with an additional \$828.99 fee charged for the technical crew and for payroll taxes. If Briarwood Ballet sold tickets to performances at the Alabama Theatre, it would have to use Ticketmaster. With each ticket sold, Ticketmaster would take \$7 to \$8 off the top, which included a \$2 historic facility fee for the Alabama Theatre. There would also be a \$600 fee for the use of the box office. The \$600 fee included the use of the box office (\$300) and the staffing of the box office (\$300).

The Wright Center was Samford University’s premiere performance space. It was the largest local theatre with 2,633 seats. The Alabama Ballet staged all of its large ballets there, and Briarwood Ballet had used this space in the past for its spring story ballets before the high school auditorium was built. The university also had a smaller theater, the Harrison Theatre, which it primarily used for the plays and dance concerts put on by the university’s Department of Theatre and Dance. The Harrison Theatre would be less expensive for Briarwood Ballet to rent but only seated 288 people. The Harrison Theatre cost \$1,200 per day plus the cost of a technical crew.

The Dorothy Jemison Day Theater was the newest space that was available to Briarwood Ballet, although it was also used by other arts organizations; it seated 500 people. Finally, The Children’s Dance Foundation also had a small 100-seat theater at its studio that provided an intimate performance space. It had been used for community dance festivals, student plays, and even by Sanspointe for some of its performances.

Financial Considerations

Peggy did not want to start an expansion only to have it end prematurely because it was too much of a drain on its cash flow. “I would be willing to put in, I would say \$5,000 to \$6,000 but not more than that,” Peggy said. “I would consider that an investment—something that we could build on.” In the long term, the expenses incurred by these performances would have to be covered in some way. That could happen through ticket sales, but it could also be covered by outside donations or by creating a surplus in other areas of Briarwood Ballet’s budget.

To date, Briarwood Ballet had only charged admission once and had kept it to a nominal \$5. Peggy felt that for the artistic quality of the performances, that was quite a deal; however, because of its current price-sensitive

audience, it would have to go slowly if it chose to raise ticket prices. The average ticket price for other artistic performances around Birmingham was \$10-15 for student tickets and \$30-40 for regular tickets. In the future, Peggy believed Briarwood Ballet could charge \$5-8 for student tickets and \$12-15 for regular tickets. She did not think it should go above \$20 a ticket based on her experience with its existing audience base.

NEXT STEPS

If Peggy decided to recommend a performance expansion, it would be critical for her to communicate the vision for these performances in an effective way; the other staff, the teachers, the board members, the volunteers, and the students would all have to be supportive of what Briarwood Ballet was trying to do because they would be the ones carrying it out to its completion. That was not likely to be easy. Briarwood Presbyterian Church leadership was not particularly supportive when Peggy had first spoken about the idea of expanding. They had a hard time understand-

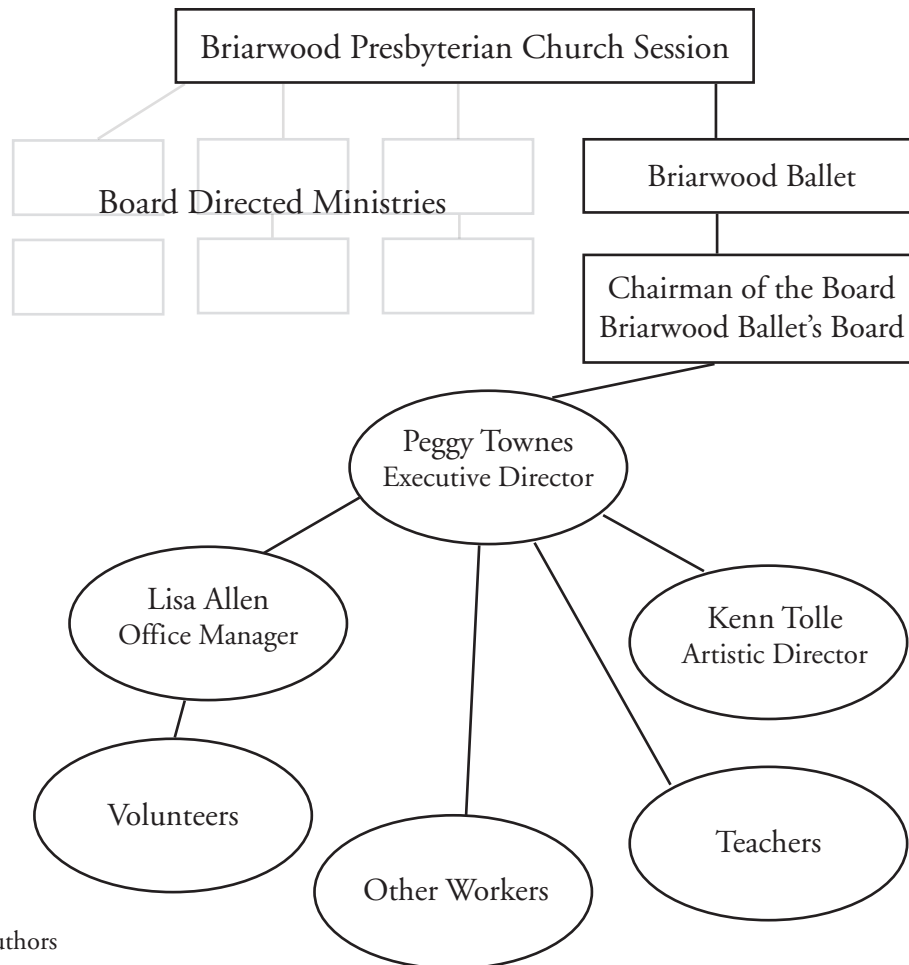
ing why she would want to spend the money to find other places in which to perform when its current venues were practically free and they already had such an appreciative audience. Peggy commented, "I need to have people catch the vision of the fact that we have a precious pearl, and we would like to, not for our sake, but for the sake of the community, take it beyond our walls. I don't know that people are going to catch that vision as quickly as I would hope that they would."

Decisions, Decisions

Peggy thought about all of the different ways it could proceed with a performance expansion. While there were a number of options, she wondered whether it would just be better to forget about expanding and maintain its current focus on excellence. There was no urgency to change what was already a very successful organization.

Peggy had a board meeting coming up in a few weeks and wanted to be prepared with a detailed course of action and the facts to back up her recommendation to the board.

Exhibit 1: Governance Structure of Briarwood Ballet



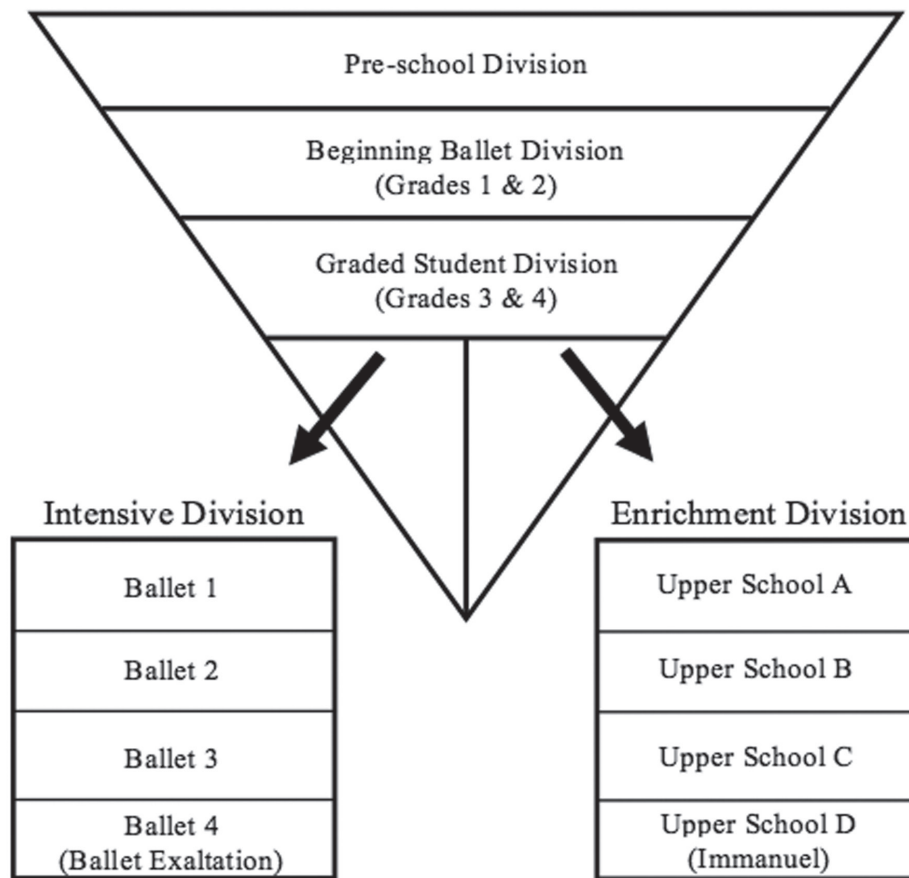
Source: Created by case authors

Exhibit 2: Mission of Briarwood Ballet

Briarwood Ballet is committed to serving God by offering quality instruction in classical ballet and dance education within a Christ-centered environment. Our school serves students of all ages, with varying goals and aspirations, who desire to study dance. Faculty members are dedicated to providing a Christian world-view of dance as art and to instilling in students the desire to use their talents to glorify God. They impart the love of dance and encourage each individual to reach his or her maximum potential both physically and spiritually. This excellent training teaches discipline of body and mind and appreciation for the beauty of art—as well as the sheer joy of dancing. Performing experiences provide a creative outlet, produce a sense of confidence and responsibility, and allow students to use their gifts to honor the Lord through dance.

Source: Briarwood Ballet Student Handbook, July 2015 Accessed from:
<http://briarwood.org/ballet/files/2015/07/HANDBOOK.pdf>

Exhibit 3: Ballet School Divisions at Briarwood Ballet



Source: Created by case authors

Exhibit 4: Tuition and Fees at Briarwood Ballet for 2015

Registration:	\$ 50 per student (non-refundable)
Ballet Costume & Performance Fee:	
3 year old classes:	\$ 60
4 year old–2nd grade classes:	\$ 75
3rd grade classes and up:	\$ 110
Dressing Room Service (Optional):	
K4–4th Grade students:	\$ 135
5th–6th Grade pick-up:	\$ 75
Yearly Tuition Fees (Annual)	
1 Class Weekly	\$ 350
2 Classes Weekly (3rd grade, 3/4G, & H2)	\$ 530
2 Classes Weekly (4th grade)	\$ 560
Upper School A	\$ 670
Upper School B	\$ 750
Upper School C	\$ 950
Upper School D or Ballet 2	\$ 1,100
Ballet 1	\$ 810
Ballet 3	\$ 1,250
Ballet 4	\$ 1,300
Jazz Elective add	\$ 300
Tap Class only	\$ 350
Tap Class if taking a Ballet class add	\$ 200

Source: Briarwood Ballet 2015-2016 Classes Accessed from:
<http://briarwood.org/ballet/files/2015/09/Ballet-Fall-2015-WEB.pdf>

**INSTRUCTOR'S MANUAL
 BRIARWOOD BALLET: AN ARTISTIC EXPANSION**

SYNOPSIS

This case focuses on Peggy Townes, the executive director of Briarwood Ballet in Birmingham, Alabama. Established in 1980 by Peggy's mother, Barbara Barker, Briarwood Ballet was a financially sustainable organization that provided classical ballet and contemporary dance classes to children from three years of age to high school. Briarwood Ballet was one of the ministries of the Briarwood Presbyterian Church. As such, the mission of Briarwood Ballet focused on spreading the Christian Gospel through dance; it considered the spiritual development of the students as more important than the artistic and professional development. At the end of 2015, Peggy was considering whether Briarwood Ballet should attempt to reach out to a wider, more secular audience in Birmingham through additional performances. A

decision to move in this direction would have administrative, artistic, staffing, and financial implications for Briarwood Ballet. It could also heighten the inherent tension between the religious mission of the organization and Peggy's desire to have Briarwood Ballet be perceived by the external community as a professional ballet troupe with quality equal to that of secular dance companies.

**INTENDED COURSE, LEVEL,
 AND POSITION IN COURSE**

This case would be most appropriate for capstone courses in strategic/general management for undergraduate students. It would also be highly applicable for specialized business courses in nonprofit management and arts management.

It can be positioned early on in a strategic management course to help get students familiar with case analysis while focusing on the role of a mission in an organization. As such, it is helpful if students have an understanding of the role of missions in organizations when they analyze this case. Additional suggested readings are provided below to assist in instructor and student understanding of mission statements. It is designed to be used in a 75-90-minute class.

LEARNING OBJECTIVES

Students will:

1. Identify and contrast the mission of nonprofit organizations and for-profit organizations, particularly with how it relates to strategy formulation and implementation. This will be further explored in the consideration of nonprofit organizations with religious-based missions as a niche segment of nonprofit organizations.
2. Identify and assess the company's strategy and current performance. The focus will be on determining whether the existing strategy is aligned with the internal and external environment.
3. Recognize the importance and influence of the competitive arts landscape in the local community.
4. Determine and evaluate opportunities for strategic action for the focal company over the next two years. Through this analysis, students will gain a stronger appreciation for the tension between growth opportunities and the religious mission of the nonprofit.

THEORY APPLICATION

- The role of mission and vision in nonprofits
- SWOT Analysis
- Strategic planning in nonprofits

THEORY LINKAGES: ORGANIZATIONAL MISSION

At the heart of this case is the mission of Briarwood Ballet. As provided in Exhibit 2 of the case, "Briarwood Ballet is committed to serving God by offering quality instruction in classical ballet and dance education within a Christ-centered environment." Throughout the case there is a tension between the mission of Briarwood Ballet to spread Christian doctrine through the use of dance, its governance structure as a ministry of Briarwood Presbyterian Church, and the desire of the executive director of Briarwood Ballet

to reach a broader audience base while being perceived by the community as a professional dance troupe. Given this case context, it is important for students to understand the role of mission statements in organizations generally and nonprofit organizations specifically.

A key role of a general manager in an organization is to help set the direction for the organization. While this can be done through a variety of ways, organizations (both for-profit and nonprofit) demonstrate their direction through mission statements which serve as a public sign about the intentions of the company to shareholders, stakeholders and employees. Students may be broadly familiar with mission statements; a good way to provide a tangible example is to use the mission statement of a popular organization (e.g., Nike) or of the college or university where the course is being taught. Mission statements are often found in the organization's annual report or the organization's website.

A mission statement has been considered to be a statement of purpose that distinguishes the organization from others of its type, identifies the scope of its operations in product (service) and market terms (Pearce, 1982), and captures the organization's unique and enduring purpose (Ireland & Hitt, 1992). A company's mission statement typically focuses on its present business purpose: who they are and what they do. It identifies the boundaries of a company's current business and speaks to the organization's products and services, its customers, and its geographical location. The language used in a mission statement should be specific enough that it differentiates the organization from others in its field.

In their article, "Organizational Visions and Visionary Organizations," Collins and Porras (1991) define an organization's mission as "a clear and compelling goal that serves to unify an organization's efforts" (p. 42). This article suggests that the mission is a key element in the overall consideration of an organization's vision and provides a useful framework for its consideration, which includes a discussion of mission. The Collins and Porras framework constructs a vision as a guiding philosophy (where core beliefs and values form an organizational purpose), which acts in the context of the environment to create a tangible image (formed through the organization's mission and a vivid description to make the mission come alive).

Organizational Mission in Nonprofit Organizations

In a nonprofit environment, an organization's mission signals a common goal and purpose to funders of the organization, to members of the organization, and to those using the organization's services. It serves to guide decision-making and to "motivate and inspire employees towards

common organizational goals” (Vandijck et al., 2007, p. 132). While the achievement of financial goals (balanced budgets) is important in the nonprofit sector (especially during times of public funding restraint), there is not the direct alignment between financial performance and shareholder value that is the paradigm for the private sector. Nonprofit organizations often have a purpose of serving broader humanity; mission statements define how these services are to be performed and speak to the context through which it will be done. In the Briarwood Ballet case, there is clearly a Christian-focused context to the organization and delivery of dance services. Given the governance structure of Briarwood Ballet as a ministry of Briarwood Presbyterian Church, a key element of Briarwood Ballet’s mission is to provide dance instruction and performance within and to promote the doctrine of the church. A key element of this case, outlined in sections below, is the juxtaposition and inherent tension of this mission against the traditional role of a dance studio where the mission is dance excellence and, in some cases, progression through formalized dance levels. Students will need to determine whether the mission of Briarwood Ballet is limiting its ability to become perceived as a professional dance company currently, and if it decides to create a professional company, whether a focus on Christian doctrine and the need to adhere to Briarwood Presbyterian Church’s guidelines for salaries will limit its ability to attract the level of talent it would need to be considered a professional organization by the arts community and the broader community in Birmingham.

REFERENCES FOR THEORY SECTION

- Collins, J. & Porras, J. (1991). Organizational vision and visionary organizations. *California Management Review*, 34(1), 30-52.
- Ireland, D. & Hitt, M. A. (1992). Mission statements: Importance, challenge and recommendations for development. *Business Horizons*, 35(3), 34-42.
- Pearce, J. A. (1982). The company mission as a strategic tool. *Sloan Management Review*, 23(3), 15-24.
- Vandijck, D., Desmidt, S., & Buelens, M. (2007). Relevance of mission statements in Flemish not-for-profit healthcare organizations. *Journal of Nursing Management*, 15(2), 131-141.

PROPOSED ADDITIONAL READINGS

Mission Statements

There are some excellent articles on mission statements that can be used as background reading by the instructor prior to teaching the case. Any of these articles could also be assigned to students to educate them further on the role of mission statements.

- Baetz., M. & Bart, C. (1996). Developing mission statements which work. *Long Range Planning*, 29(4), 526-533.
- Bart, C. (1997). Sex, lies and mission statements. *Business Horizons*, 40(6), 9-18.
- Collins, J. & Porras, J. (1991). Organizational vision and visionary organizations. *California Management Review*, 34(1), 30-52.

Nonprofit Organizations

The following chapters in the nonprofit textbook Introduction to Nonprofit Management (Thousand Oaks, CA: Sage Publications Inc.), authored by W. Glenn Rowe and Mary Conway Dato-on, are applicable if the focus of the course is on nonprofit organizations:

- Chapter 3: Nonprofit Organization Governance and Structure
- Chapter 4: Leadership in Nonprofit Organizations

The following chapters in Peter Brinckerhoff’s nonprofit book Mission-based Management: Leading your Not-for-profit (Hoboken, NJ: John Wiley & Sons, Inc.) are applicable if the focus of the course is on nonprofit organizations:

- Chapter 4: The Mission is the Reason
- Chapter 12: A Vision for the Future

In addition, the Drucker (1989) article titled “What Businesses Can Learn from Nonprofits,” while a bit dated, provides a good overview of the differences between management in profit and nonprofit organizations, including a discussion about organizational mission. It also provides examples of religious nonprofits.

- Drucker, P. F. (1989). What business can learn from nonprofits. *Harvard Business Review*, 67(4), 88-93.

Religious Nonprofit Organizations

The following articles provide a background overview of strategic analysis in organizations with a religious mission:

Berger, J. (2003). Religious nongovernmental organizations: An exploratory analysis. *Voluntas: International Journal of Voluntary and Nonprofit Organizations*, 14(1), 15-39.

Miller, K. D. (2002). Competitive strategies of religious organizations. *Strategic Management Journal*, 23(5), 435-456.

In addition, the following articles by Miller (2006) and Tracey (2012) provide a context for why the consideration of religious organization is relevant to a management context.

Miller, K. D. (2006). A case for including religious organizations in management research. *Journal of Management, Spirituality, & Religion*, 3(3), 214-230.

Tracey, P. (2012). Religion and organization: A critical review of current trends and future direction. *Academy of Management Annals*, 6(1), 87-134

Strategic Management

Chapter 2 (Strategy) of Mary Crossan, Michael Rouse, W. Glenn Rowe, and Cara Mauer's strategic management textbook *Strategic Analysis and Action: 9th edition* (Toronto, ON: Pearson Prentice Hall) provides a tool for considering an organization's strategy.

RESEARCH METHODS

This field case was written based on first-person interviews conducted by the case writers and the focal company over a period of four months (January to April, 2015). These interviews were conducted both in person and over the phone, with follow-up information provided through email. Additional information was provided by Briarwood Ballet from October to December, 2015. In addition, Briarwood Ballet provided source documents, including financial, marketing, and administrative material. The case authors also used the company's external website (<http://briarwood.org/ballet>) as a source of information as well as secondary sources to gain insight into the overall industry and the Birmingham community. None of the information provided in the case is disguised. The case authors wish to thank Briarwood Ballet for its openness and transparency related to the use of data in this case.

SUGGESTED TEACHING PLAN

Proposed structure for an 80-minute class:

1. Introduction	3 minutes
2. Nonprofit Organizations	10 minutes
3. Introduction to Briarwood Ballet (Video)	7 minutes
4. SWOT Analysis	15 minutes
5. Current Organizational Performance	10 minutes
6. Strategic Options	20 minutes
7. Mission Statement	10 minutes
8. Conclusion	5 minutes

The questions in this instructor's manual are designed to facilitate group discussion in the classroom. It would also be possible to split the class up into smaller buzz groups to discuss different facets of a single topic. An outline of this suggested teaching plan appears below.

1. Introduction

Students should already be generally familiar with the case, having read the body of the work before coming to class. Take a minute to briefly introduce the topic and ask the students to describe in their own words what the Briarwood Ballet is and the situation it is facing. Explain to the students that in class, they will be taking the role of consultants helping Peggy Townes think through all the facets of the proposed expansion and then making a recommendation for what course of action she should take.

2. Nonprofit Organizations

Unless this case is used in a course on nonprofit management, students will need to be introduced to the concept of a nonprofit organization. It is important because the profit maximization motivation is usually the goal of organizations in traditional strategy cases; however, while financial stability is important in nonprofit organizations, it is not usually their primary goal. Nonprofit organizations have different corporate and governance structures and are accountable to different legislation (e.g., in the United States they are not bound by Sarbanes-Oxley as they are not publicly traded companies). They often report to volunteer boards made up of key stakeholders or members of the community.

Instructors may want to take up to 10 minutes making sure students are clear with the differences between for-profit and nonprofit organizations. The additional readings provided may assist Instructors with this conversation. This discussion can be contextualized by asking students whether they have been involved in nonprofit organizations (many likely have) or have served in a leadership capacity. This would include student clubs or sports teams, providing stu-

dents with the opportunity to tie their experiences with the context of the case.

Once students understand the differences between non-profit and for-profit organizations, instructors should take 2-3 minutes to discuss the niche that religious organizations play within the broader nonprofit category. Religious organizations have missions that have a religious awareness or instruction context in addition to the core secular activities.

3. Introduction to Briarwood Ballet

In order to transition into the case discussion, instructors can show students a video of Briarwood Ballet. The video of Briarwood Ballet referenced can be found on the home page of its website at <http://briarwood.org/ballet>. It is approximately 7 minutes in length. The video allows students to meet the founder of Briarwood Ballet and see how dance instruction is integrated with the religious focus of the company.

4. SWOT Analysis

Encourage the students to come up with as many strengths, weaknesses, opportunities, and threats as they can. You can either accomplish this by discussing in one large group or by splitting the class into four smaller groups and having each of them take a letter of the SWOT. The instructor should allow the discussion to flow through each area, capturing the student input for each of the four areas on a whiteboard. Once each of the four areas have been covered, the instructor should ask students to identify which of the strengths, weaknesses, opportunities, and threats are the most important and relevant for Briarwood Ballet's proposed expansion. In order to highlight this discussion, the instructor should highlight the key elements with a different colored marker to make the contrast more immediately visible.

5. Current Organizational Performance

This section should be spent in a group discussion, building on the insight from the SWOT analysis to think through how the company is "competing" in the marketplace and whether it is aligned with the external environment and the internal organization of the company. This section could include a discussion of the financial performance of the organization and the competitive advantage it has because of the free/reduced cost rehearsal and performance space to which it has access because of its affiliation with Briarwood Presbyterian Church.

6. Strategic Options

While there are a number of things the executive director, Peggy Townes, could do, it is easiest to position this as a

"Go/No Go" decision. To force students to make a decision, a straw poll vote could be held at this point. The instructor should create a table on the board with "Expansion" and "No Expansion" headers. The class can be guided to discuss the different options for each facet of the decision, and a few pros and cons for each. Then, when the instructor feels the students have a good handle on the general decisions, he or she can split the students into smaller groups to work through what needs to be considered to go ahead with the expansion. Each group should think through each facet of the expansion (how performances should be staffed, how many will be done, where they will take place, and how much tickets should be). This analysis should take no more than 10 minutes in order to allow for groups to present to the broader class. A sample of groups (2-3) should be asked to briefly present their analysis.

7. Mission Statement

It is important to tie back the strategic analysis to the topic of the organizational mission in nonprofits. If Briarwood Ballet goes through with the proposed expansion, it would be doing something very different than what it usually does. By revisiting the organization's mission, students should begin to see that there is an inherent tension between the desire to become perceived in the same strata as the professional dance troupes in the area and the focus of its mission on spreading the Christian doctrine through dance rather than performance excellence (although the two are not mutually exclusive). Students should discuss the purpose of nonprofit mission statements in general and Briarwood Ballet's in particular. They should also think about whether or not Briarwood Ballet should change its mission statement if it undertakes this proposed expansion and whether this would even be possible given its governance position within Briarwood Presbyterian Church. It would also be difficult to change the mission given the very strong management preferences of Peggy Townes that support the ministry-driven nature of the organization.

8. Conclusion

Instructors can end the class by noting what has happened with the organization (see Epilogue below) and asking students for their key takeaways from the case analysis. Instructors should reiterate the difference between the mission of for-profit and nonprofit organizations. It is also important to ensure that students understand that nonprofit organizations have the same management issues as for-profit organizations and so the need for strategic management in nonprofit organizations is equally important. Finally, instructors should address the religious context of this case,

noting that it can create tensions between the desire to grow and the need to remain true to faith-based values. As Briarwood Ballet moves beyond its local community, it may find it difficult to attract a broader, more diverse audience at a higher ticket price if its dancers do not embody the same level of professional quality as secular dance troupes. If it decides to create a professional dance troupe, it will be more limited in terms of talent if it only hires dancers who subscribe to the same Christian values as espoused by Briarwood Ballet.

CASE DISCUSSION QUESTIONS AND ANSWERS

Discussion Questions

1. Perform a SWOT analysis on Briarwood Ballet. What are the key insights from your analysis?
2. What is Briarwood Ballet's current strategy? How well is the strategy currently working?
3. Should Briarwood Ballet move forward with the proposed expansion? If so, what decisions should be taken related to adding professional dances, performance locations and ticket pricing? If not, what strategic options should be considered instead?
4. What is the purpose of a mission statement in a non-profit organization? How does the proposed expansion fit with the current mission of Briarwood Ballet?

Suggested Answers to Discussion Questions

1. Perform a SWOT analysis on Briarwood Ballet. What are the key insights from your analysis?

IM Exhibit 1 provides a SWOT analysis on Briarwood Ballet. This can be captured on the Board so that students have it as a reference for later discussion of options.

The key insights from the SWOT analysis include:

- Kenn Tolle is an extremely valuable asset for Briarwood Ballet. His connections will be important if the organization decided to bring in other artists either as performers or guest choreographers.
- Positive financial performance in recent years means Briarwood Ballet has funding to support an expansion, although it is uncertain whether it would be sustainable over the long-term.
- While the main focus on classical ballet may provide the organization with credibility in that space, given the demand for competitive dance, it may be missing a market opportunity. However, a move to competitive dance would be at odds with the organization's current values.

- To attract new audience members for its performances, Briarwood will need to significantly augment its current marketing activities.
- Affiliation as a ministry within Briarwood Presbyterian Church provided many advantages (e.g., free rehearsal and performance space, built in audience for performances) but also limited Briarwood Ballet from organizational, artistic, and growth perspectives;
- Competitive environment is really focused on the local area right now. While Briarwood Ballet does travel, that is a secondary issue right now and the real focus should be on how to grow secular audience awareness of Briarwood Ballet and attendance at performances.

2. What is Briarwood Ballet's current strategy? How well is the strategy currently working?

There are a number of ways to consider the current strategy of Briarwood Ballet. Using Porter's generic strategy matrix, Briarwood Ballet is using a focused differentiation strategy. It is focused in that it has a classical ballet focus (although they do offer some tap and contemporary dance) and does not offer competition dance. It is also geographically focused in that it has one location in Birmingham, Alabama. It is differentiated from its competition in that, again, it concentrates on classical ballet. An even stronger point of differentiation is the religious focus of its mission and Briarwood Ballet's role as a ministry of the Briarwood Presbyterian Church. While students do not have to be Christian to attend Briarwood Ballet, it is a strong focus of its teaching methodology and the theme of performances. However, it is not a pure differentiation strategy as one might witness at private dance schools where a price premium is charged due to the school's reputation or prestige. Briarwood Ballet keeps tuition costs affordable, has traditionally not charged for performances, and, due to organizational policies of Briarwood Presbyterian Church, compensates instructors and staff at a lower level.

Students can also be asked to consider Briarwood Ballet's strategy in more detail. While there are a number of ways to do so, one mechanism has been proposed by Crossan, Rouse, Rowe, and Maurer in their strategic management textbook *Strategic Analysis and Action* (full reference provided above in "Proposed Additional Readings"). The Strategy Triangle asks students to consider the organization's goals, core activities, product market focus, and value proposition along with the generic strategy of the organization. The analysis can then be used to determine whether the current strategy is aligned with the internal and external environments as well as with the strategic choices being considered. IM Exhibit 2 provides a Strategy Triangle analysis for the existing strategy of Briarwood Ballet.

Currently the strategy of Briarwood Ballet is working quite well as evidenced by its positive financial performance, sustainability of its enrollment (there is no evidence in the case to suggest that fewer students are enrolling at Briarwood Ballet), and attendance at performances. Students may point to the fact that Briarwood Ballet had to institute a ticketing system just to make sure fans were able to find seats when arriving at performances. While Peggy could continue on with her current operations, it does not allow for organizational growth.

3. Should Briarwood Ballet move forward with the proposed expansion? If so, what decisions should be taken related to adding professional dances, performance locations, and ticket pricing? If not, what strategic options should be considered instead?

While there are a number of potential options available to Briarwood Ballet, students will focus on a go/no-go option for the proposed expansion. A good way to start this discussion is to ask students to vote on whether Briarwood should proceed with the expansion or stay with the status quo. Using the show of hands, instructors can then start to ask students who represent each of the positions why they came to that conclusion. Instructors can capture this information on the board in a way that forms a pro/con analysis for each option (see IM Exhibit 3), prompting additional information from the students. This will get the broad elements of the expansion option on the board as well as some of the challenges with instituting an expansion option given the current organizational state of Briarwood Ballet and its overarching mission. The mission element should be put aside for the moment and instructors can focus on more of the operational decisions related to this potential expansion.

Alternatively, instructors can ask students more broadly what options are available to Briarwood Ballet. These could include the following.

- a) The least expensive option would be for Briarwood Ballet to keep using its student dancers for these new performances. This would dramatically cut the staff expenses needed for the proposed expansion, which in turn might make this a financially feasible endeavor. However, Peggy has said that the students' performance time is pretty maxed out right now, so it would be very hard to do more than one additional performance with only the students. Having only student performers also means that the performances would not be seen as artistically rigorous, which could impact audience numbers.
- b) Briarwood Ballet could create a full-fledged professional company that would do the proposed performances. One of the benefits of creating a professional company

would be increased visibility in and respect from the artistic community. Since Briarwood Ballet wanted to start expanding its connections in this community, this could be an important first step that it needs to take. A marked disadvantage is that, unlike students, professional dancers have to be paid. This would put a constant strain on Briarwood Ballet's resources that it may or may not be able to match with revenues from the increased performances. Also, since Briarwood Presbyterian Church sets Briarwood Ballet's pay scale, that could create difficulties in attracting professionals as well.

- c) Briarwood Ballet could hire a few professionals to dance with the students for each performance, like it did previously. This would be a good middle ground between having all student performers and creating a professional company. Also, since Briarwood Ballet has done something similar in the past, it would not be venturing into entirely new territory.

After there is a broad discussion of options, students can be broken up into buzz groups (groups of three to four students seated near each other) in class to consider the decisions that would need to be taken to expand current performances. Students should specifically be asked to make recommendations on the composition of the troupe (student vs. professional), the number of additional performances, the location where they should be held, and the price for tickets. They should also be asked to consider the financial implications of the expansion and how it will be funded. Students can discuss these elements for 10 minutes in the small groups and a sample of groups can present the analysis.

4. What is the purpose of a mission statement in a non-profit organization? How does the proposed expansion fit with the current mission of Briarwood Ballet?

The case discussion should end by tying all of the analysis back to the mission of the organization. At this point, it is important to remind students about the definition of mission statements. The mission statement provides the "bottom line" for nonprofit organizations. They cannot judge their success solely by how much profit they make, and the mission gives a standard by which to judge their success instead.

The biggest challenge with the proposed expansion is not related to organizational or logistical issues for an expansion but rather the inherent tension that is being created between a desire for growth/recognition/professionalism and the existing mission of Briarwood Ballet, which is focused on spreading Christian doctrine through dance. The majority of professional dance troupes with strong

brand recognition are secular organizations where selection into the company is based on technical excellence. This drives the perception in the community of excellence which allows the dance troupe to charge higher ticket prices. In addition, there is an expectation that professional dance companies have repertoires that include ballets (e.g., *Swan Lake*, *Sleeping Beauty*, and *The Nutcracker*) which may be at odds with a Christian message or at a minimum, not include elements that relate to the Christian faith. If Briarwood Ballet wishes to grow beyond a local, student-based dance company, it will need to decide whether it can do so under its existing mission.

This discussion also directly plays into where performances should take place. Currently, it is not clear whether Peggy wants to attract new audience members just so that they can appreciate the aesthetic and quality of the dancers or whether there is an ulterior motive to also bring these individuals into the church. Performances solely at the church or at the high school (which is also a ministry of Briarwood Presbyterian Church) may limit the number of new audience members, given they may prefer to go to performances in secular locations.

Given the current positioning of Briarwood Ballet as a ministry of Briarwood Presbyterian Church and given the management preferences of Peggy, it is unlikely that the mission of Briarwood Ballet would change to shift it away from its current Christian focus. Changes would put the free facilities at risk and potentially alienate the existing audience and volunteer base. It would also take a lot of time and effort and would be challenging to receive approval from the existing Briarwood Ballet board and the Briarwood Presbyterian Church administration. A stronger path forward for Peggy would be to be more realistic about the ability of Briarwood Ballet to be perceived as equivalent to other professional arts organizations (e.g., Alabama Ballet) and look to opportunities to expand awareness of its organization to communities that would be supportive of a faith-based dance troupe.

EPILOGUE

As of June 2017, the Briarwood Ballet had not yet decided whether to undertake an expansion of its current strategy or whether it should create a professional dance troupe. It has institutionalized its volunteer group, now called Pointe Guard to support the Briarwood Ballet. Additional information about some of the tasks undertaken by Pointe Guard can be found at <http://briarwoodballet.wixsite.com/pointeguard>.

ENDNOTE

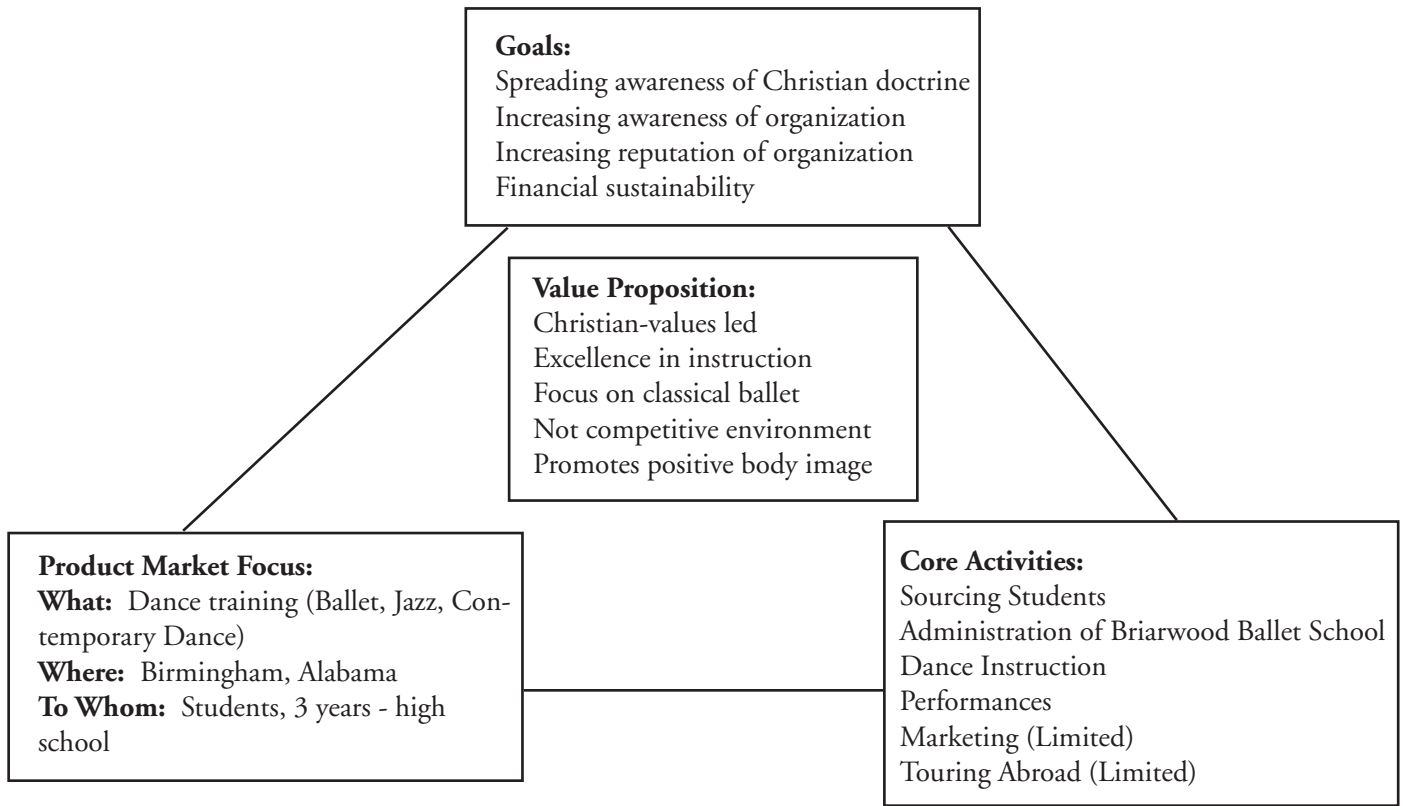
- ¹ The Facebook page can be found at www.facebook.com/BriarwoodBallet

IM Exhibit 1: SWOT Analysis

<p>Strengths:</p> <ul style="list-style-type: none"> • Kenn Tolle is an incredible artistic strength for the organization <ul style="list-style-type: none"> • Institutional history with organization (15 years) • High quality performances • Deep external connections with dance community locally and nationally • Because he knew so much about costuming, choreography, sound design, and the like, he could be put in charge of all the artistic aspects of the expanded performances • Free rehearsal and performance space • Built in audience due to affiliation with Briarwood Presbyterian Church • Strong volunteer base • Sustainable financial performance <ul style="list-style-type: none"> • Ended each year in the black for past number of years • Not dependent on ticket sales • Focus on classical ballet in an industry that had increasingly gone towards competition dance • Briarwood Ballet's Christian focus aligned with existing target market 	<p>Weaknesses:</p> <ul style="list-style-type: none"> • Briarwood Ballet under governance of Briarwood Presbyterian Church <ul style="list-style-type: none"> • Cannot set own pay scales so harder to attract teachers • Briarwood Ballet's connection with a conservative, evangelical church and performances in a religious space alienates potential students and audience members • Shared its facilities with other ministries at the Church <ul style="list-style-type: none"> • Lack of room availability • May not have rehearsal space for additional performances • Performers were made up completely of students <ul style="list-style-type: none"> • Limited the number of performances • Limited Ballet's artistic credibility • Little to no marketing <ul style="list-style-type: none"> • Briarwood Ballet was not well known outside local community • Lack of experience/success with fundraising • Lack of professional company made it difficult to compete with professional arts organizations at the same ticket price.
<p>Opportunities:</p> <ul style="list-style-type: none"> • Large existing audience that could be leveraged to spread the word to the broader community. • Many new artistic initiatives happening in downtown Birmingham • Could signify that a general appreciation for the arts was growing in the Birmingham community at large, which would make it easier for the Ballet to attract new audience members • Creation of a professional troupe could provide opportunities for graduating Briarwood Ballet students 	<p>Threats:</p> <ul style="list-style-type: none"> • Ongoing affiliation with Briarwood Presbyterian Church made it challenging for the brand of Briarwood Ballet to represent artistic excellence in performance • Briarwood Ballet's direct competitors had distinct competitive advantages in different areas • Growth in new artistic initiatives creating greater competition for consumers' wallet • Changes in strategy could risk alienating powerful and supportive existing audience base • Kenn Tolle could leave the organization

IM Exhibit 2: Strategy Triangle

Generic Strategy (Porter): Focused Differentiation



Source: Created by case authors

IM Exhibit 3: Go/No Pros and Cons

GO (Expansion)		NO GO (Status Quo)	
Pros	Cons	Pros	Cons
Expose new people to Briarwood Ballet	Uncertain whether it is financially sustainable which could put other programs at risk	No disruption to current operations	Stagnant growth
Could attract new people to Christian doctrine	Not supported by Briarwood Presbyterian Church	No chance of alienating Briarwood Presbyterian Church	Limited ability to fulfill mission of organization to spread Christian doctrine
Improve reputation	May not attract new audiences	Can keep using current facilities	No opportunities for students once they graduate
Provide more performance opportunities for dancers	Secular audiences could be turned off by religious nature of ballets	No risk to financial sustainability	
Increase mentorship opportunities between professional dancers and students	Have to hire additional staff		
Revenue generation through ticket sales	May need more practice space which could be costly		
	May not attract top tier professionals due to religious context of Briarwood Ballet		

Source: Created by case authors