



BEST PRACTICES

A collection of examples and best practices for
IOWA'S HISTORIC MAIN STREET THEATERS

C O N T E N T S

Introduction and acknowledgement

Theater profiles

Successful fundraising: Town Hall Theater (Middlebury, Vermont)	1
Strategic evolution: Commonweal Theatre (Lanesboro, Minnesota)	4
Building an image: Floyd Country Store and Sun Music Hall (Floyd, Virginia)	6

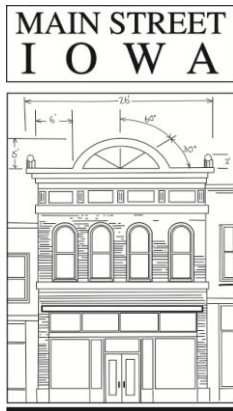
Audience development + engagement	8
Audience research	16
Block booking	20
Boards + committees	22
Chart of accounts	25
Conflict of interest policies	31
Education programs	32
Emergency procedures	33
Fundraising	38
Insurance	41
Marquee rentals	43
Mission statements	44
Nondiscrimination policies	47
Operating endowments	48
Planning	51
Programming endowments	57
Records retention schedule	58
Rental applications + agreements	60
Volunteers	62
Resources: Organizations	69
Resources: Publications	74

INTRODUCTION + ACKNOWLEDGEMENT

Main Street Iowa, a program of the Iowa Economic Development Authority's Iowa Downtown Resource Center, and the Community Land Use and Economics Group, LLC have assembled this collection of examples from theaters around the country as a resource for historic theaters in Iowa's downtowns. It is our hope that this collection will continue to grow as the theaters participating in Main Street Iowa's historic theater initiative and their partner Main Street programs add their experiences to it.

The collection begins with profiles of several small historic theaters that have had success in one or more aspects of theater management, marketing, programming or collaboration. It then provides summaries of several dozen topics. Each summary includes a brief overview of the topic, with some examples and suggestions based on best practices recommended by theater practitioners.

Acknowledgement



This manual is offered by the Iowa Economic Development Authority/Iowa Downtown Resource Center/Main Street Iowa, with financial support of USDA Rural Development, thanks to a USDA Rural Community Development Initiative grant.



IEDA is an intermediary of USDA assistance.

This institution is an equal opportunity provider and employer. If you wish to file a Civil Rights program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, found online at http://www.ascr.usda.gov/complaint_filing_cust.html, or at any USDA office, or call (866) 632-9992 to request the form. You may also write a letter containing all of the information requested in the form. Send your completed complaint form or letter to us by mail at U.S. Department of Agriculture, Director, Office of Adjudication, 1400 Independence Avenue, S.W., Washington, D.C. 20250-9410, by fax (202) 690-7442 or email at programIntake@tusda.gov.

PROFILE : SUCCESSFUL FUNDRAISING

TOWN HALL THEATER

Middlebury, Vermont (pop. 8,183)

In 1883, the Town of Middlebury convened a meeting to explore options for creating a Town Hall and community assembly space. After evaluating eight sites, they selected one – and, within one year, the building was completed. It contained a 600-seat auditorium – the Middlebury Opera House – with town offices in the basement. In 1923, the auditorium was renovated to serve as a movie theater. But, 15 years later, a new theater opened nearby, and the Opera House’s attendance plummeted. It was renovated once again and re-launched as the Town Hall Theater, but it could not regain market traction. In 1958 the Town Hall moved out of the building. The building was sold, and the new owner removed the stage, balcony, and stained glass windows in order to use it as a furniture store, then a restaurant (with a dance floor). Ten years later it was purchased by the Knights of Columbus, who used it as a meeting hall and community assembly space for more than 30 years. In 2000, the Knights sold the building to a community group interested in converting the building back into a theater.

The Town Hall Theater’s early board of directors and volunteers raised money in a number of innovative ways. They selected a group of 70 Middlebury residents – the Stagehands – to solicit contributions from community members. They organized an extensive series of Toast the Town Hall dinners, ticketed dinners and small performances held at private homes. They held a popular New Year’s Eve party in the theater in 2003, even though the theater was still unheated. A brick sponsorship program raised \$100,000; people could buy one of the bricks being removed from the bricked-in windows for \$100 or, for \$250, they could have their names carved on the bricks, which were then installed in a new garden. In 2008, after eight years of fundraising, piecemeal restoration, and a string of temporary occupancy permits, the Town Hall Theater officially reopened.

The renovated Town Hall Theater has 232 seats, making it one of the smallest theaters in Vermont. It hosts 165 events annually. Many of the events are produced by one of four resident companies – the Opera Company of Middlebury, Middlebury Actors Workshop, Middlebury Community Players, and the Made in Vermont Chorus. The theater plans to add two additional resident companies within the next few years – a children’s theater and an orchestra. It also books outside performers, presents film, and offers live HD broadcasts of Metropolitan Opera and National Theater of Great Britain performances. It leases space to a local dance instructor who offers four classes each week there for children and adults. And, it rents the theater for a variety of private functions. Doug Anderson, the Town Hall Theater’s executive director, says “When we’re dark, we’re losing money – we can’t afford it. I would much rather rent the place out to a bunch of fishermen, as we did recently, and make a little money that night.”

The theater has an annual budget of \$320,000 – but each presentation is budgeted separately, so production costs (which vary considerably from year to year) are not included in this. Of the \$320,000, roughly 79 percent is used for staff salaries, 14 percent for building expenses, and the remainder for miscellaneous expenses. While many small theaters raise roughly half of their revenues through ticket sales and half through fundraising (memberships, donations, grants, etc.), only one-third of the Town Hall Theater’s income comes from ticket sales. Almost 60 percent comes from fundraising, and the remainder (about nine percent) comes from concessions and other sales.

Because it depends so heavily on fundraising, the Town Hall Theater continues to find creative ways to raise money. Among its fundraising tools and activities:

- **Bequests:** In 2012 the theater established an endowment fund, The Town Hall Theater Endowment. The endowment fund is managed by the Vermont Community Foundation. The theater’s board and volunteers actively seek bequests from community members for the endowment, and they ask people who make bequests to make a statement that they can then use to encourage other people to leave the Town Hall Theater in their wills. These statements help personalize the bequest experience and have been effective in securing additional bequests. An example:

“An early community player, both as an actor and director, I shared the dream that one day the Players would have a theater they could call ‘home’. The Town Hall Theater is the answer to that dream. I hope my bequest will help that dream survive and prosper.”

- **Wish list:** Each year, the theater publishes a wish list of items it needs, encouraging supporters to make a donation for a specific item. The theater’s currently wish list includes items ranging from \$50 for a microphone stand to \$2,000 for video monitors for the green rooms and dressing rooms.
- **Membership campaigns:** Memberships have always been an important part of the Town Hall Theater’s fundraising, with membership levels ranging between \$50 and \$2,500. But, every few years, the theater organizes a special membership campaign to attract new members. In 2009, for example, the theater built a membership drive around a King Kong theme. They used the slogan “Be Part of Something Big” and designed a campaign poster like a classic movie poster – but with King Kong climbing up the theater building, rather than the Empire State Building. They mounted a model King Kong on the side of the theater, with their membership goal of 500 members (in a town of 8,000) posted at the top of the building. As the number of members grew, they moved Kong further up the building. They kicked off the campaign with a screening of the original 1933 movie, with 25-cent admissions tickets.
- **Special fundraising events:** The theater organizes a series of fundraising events throughout the year. A portion of the profits from certain events is designated for the theater’s general

operating budget. It has also continued its successful series of small, intimate events in private homes, the format that worked so well in the mid-2000s, when the theater was raising money for the building's rehabilitation. For example, its annual Christmas event usually begins with small parties in private homes, with someone reading a Christmas short story, followed by a Christmas parade and acoustic concert at the theater.

- **Donor recognition:** The theater is very conscientious about recognizing its major donors. So, for example, it invites all its \$1,000+ donors to cocktail parties every three months, where it gives donors previews of upcoming shows.

PROFILE: STRATEGIC EVOLUTION

COMMONWEAL THEATRE

Lanesboro, Minnesota (pop. 743)

Several decades ago, downtown Lanesboro, Minnesota's economy was suffering. Eric Bunge, one of the cofounders of the town's Commonweal Theatre, says that when the theater was launched in 1989 the downtown was practically vacant. "Almost every building on this street was for sale. You could have had any one of them for \$10,000."

Lanesboro decided to reverse its downward economic spiral by using the arts as its primary community economic development strategy, and the Commonweal Theater is a central component of its strategy. The theater was launched in 1989. Since then, it has pursued a deliberate path to expand its programming and its audiences. Sometimes, it has done so at the request of town officials and tourism representatives who recognize the theater's key role in reversing the downward spiral (the theater plays a vital role not just in attracting visitors and building traffic for restaurants and other businesses but also in shaping public perception of Lanesboro). Sometimes, it has done so in order to reach its own artistic goals.

The theater began when the Lanesboro Arts Council approached Bunge and two others and asked them to create a theater as part of the community's arts-based economic development strategy. That year, the new theater produced two shows – "Crimes of the Heart" and "A Midsummer Night's Dream" – over the course of eleven weeks.

The theater's operating model differs slightly from those of most small, rural downtown theaters. It is primarily a presenting theater, although it also does steady business as a rental facility. But, rather than drawing primarily from the community and region for its production staff, it recruits and attracts artists from throughout the country. And it requires its artists to take on front or back-of-house responsibilities, like selling tickets, building sets, or running the light board, in addition to their acting, directing, or other presenting roles.

Since its launch in 1987, the theater has steadily and deliberately launched a new initiative every year or two:

- In 1991, it began a student matinee program.
- In 1992, a two-week-long immersive training program for local high school students.
- In 1993, it modified its repertory season at the request of the town council, putting it on a rotating schedule that made it possible to reach more patrons (particularly seasonal visitors).

- In 1995, the Lanesboro Radio Company, which produces a regionally-broadcast dramatic radio program, became part of the theater.
- In 1996 the theater created its first touring production, performing in Minneapolis and Red Wing, Minnesota.
- Between 1996-1998 the theater developed a script and produced a play about farm families in the Lanesboro area; in 1998, it presented the completed production.
- In 1997, the theater began collaborating with Elderhostel and Winona State University to offer workshops to older and retired adults.
- In 1998 it launched an annual Ibsen Festival, attracting a growing audience of scholars and Ibsen enthusiasts from around the country and around the world.
- In 2000, the theater launched a New Play Series.
- In 2001 it launched an Artists Residence program, offering housing and production support.
- From 1998 to 2007, the theater raised money for a new 186-seat \$3.5 million facility – The Commonweal – which opened in July 2007.

The Commonweal currently offers six repertory performances annually, with more than 70 shows, and with an annual budget of \$750,000 and attendance of over 22,000 each year. It has 1,500 subscribers – just slightly less than *twice* the town’s population. One-quarter of its shows sell out.

PROFILE : BUILDING AN IMAGE

FLOYD COUNTRY STORE and SUN MUSIC HALL

Floyd, Virginia (pop. 429)

Residents of Floyd, a tiny town in the Appalachian Mountains, have always had a strong appreciation for bluegrass and mountain music. But, over the past two decades, Floyd's love of music has transformed the community into a culturally rich economic powerhouse, with music spilling out of performance venues, onto the streets, and into shops and restaurants.

The "Floyd Phenomenon", as people have begun calling Floyd's economic transformation, began when Woody Crenshaw, a local business owner, bought the Floyd Country Store (est. 1910) and began inviting local musicians to play there on Friday nights. His goal was to make the Country Store a place where musicians would feel comfortable hanging out, where they could casually jam with other musicians. There was no admission fee; people would simply wander in and listen to the music.

Soon, Floyd's Main Street was crowded with people milling around on Friday nights. And, soon after that, a downtown restaurant opened The Sun Music Hall in the building adjoining the restaurant, one of several buildings from a defunct downtown textile mill. The Sun Music Hall quickly became a popular and beloved performance space, hosting a monthly contra dance, a busy calendar of touring performances, a periodic skit night, and occasional poetry slams. When the restaurant decided to close, a group of worried residents pooled their money, created a limited liability company, and bought it, reopening the restaurant as the Dogtown Roadhouse and keeping the Sun Music Hall in operation.

The Sun Music Hall and the Floyd Country store are not the only performance venues in town. The June Bug Center, which evolved from the Floyd Theater Group (an organization that hosted plays and skits in the 1980s and 1990s), is a multi-function community space with a small black box theater, an after-school enrichment program and an Aikido/TaekwonDo studio. Most of the town's dozen or so restaurants set aside space in a corner for impromptu performances. Even the town's most upscale restaurant, the Oddfellas Cantina, hires a classical guitarist to play during dinner.

How can a town of 429 people support so many arts venues? There are many different opinions, but most people seem to agree that there are several reasons:

- The town's rural mountain setting has made it relatively self-sufficient.
- Residents have gradually shaped a culture that values social activity (like jamming with neighbors) over more isolated activities, like watching television.

- Older people enjoy sharing their musical knowledge and traditions with young people.
- The community's long-time residents embraced a small influx of newcomers from a defunct 1970s commune who brought new ideas to town.

The town is about an hour from Roanoke, the closest major city (pop. 97,000) and from the Virginia Polytechnic Institute in Blacksburg (pop. 42,000), so it is within reach of a large number of day visitors, and this market has been essential to Floyd's success, making it possible for the town to support businesses and arts venues that wouldn't otherwise be as viable.

The town has gradually built on its reputation as a friendly, easy-going, music-loving community, adding activities, businesses and events that reinforce its image:

- Friday Night Jamboree takes place in the Floyd Country Store every Friday night.
- The Sun Music Hall hosts a popular contra dance every other Saturday night.
- Every summer, the community hosts FloydFest, a four-day festival of music and arts. Launched ten years ago, FloydFest now attracts more than 10,000 visitors (most of whom camp out) and features both local talent and nationally known performers (its 2014 roster includes Ben Harper, Lauryn Hill, Ziggy Marley and Thievery Corporation).
- Impromptu musical performances spill out onto downtown street corners almost every Saturday, with many locals stopping by to jam for a song or two.
- In 1995 a group of Floyd residents decided to convert a historic dairy barn into an arts center. Over the course of eight years the community raised money for the project; opening it as the Jacksonville Center for the Arts in 2003 (Jacksonville was the town's original name). The Jacksonville Center offers classes in pottery, blacksmithing, papermaking, and other craft skills; since 2005, it has offered Virginia's only residential crafts school.
- A number of music and arts-related businesses have cropped up in Floyd, expanding its foothold in music and arts. These include a custom banjo maker; a recording studio specializing in bluegrass, gospel, blues, rock, and reggae; a book and CD store that claims to offer the largest selection in the world of bluegrass and old-time recordings and books; a music studio offering lessons in piano, organ, voice, and music theory; and a music school (upstairs above the Floyd Country Store) that offers instruction in bluegrass and mountain music.
- In 2013, Floyd was chosen to host the inaugural Blue Ridge Music Festival, sponsored by the Virginia Commission for the Arts, National Endowment for the Arts, Roanoke Symphony Orchestra.

A U D I E N C E D E V E L O P M E N T + E N G A G E M E N T

A theater's audience development activities are (or should be) integrally intertwined with its marketing, programming and fundraising activities. When audience development activities are successful, ticket sales grow, contributions increase, partnerships expand and the number of people who feel connected to the theater multiplies. New patrons can lead to new types of programming. New partnerships can lead to new potential donors. New contributors can lead to new audiences.

But, attracting and growing audiences is becoming increasingly difficult. For the past decade or two, theaters and other arts institutions throughout the United States have seen attendance drop. In a 2008 report on audience development, Christine DeVita, president of The Wallace Foundation, cited several concerning trends:

- The number of arts-related organizations in the U.S. is growing at a faster rate than demand for the activities they offer.
- There are more activities competing for Americans' leisure time today than ever before.
- The National Endowment for the Arts focuses on seven major art forms (jazz, classical music, opera, musical theater, ballet, theater and visual arts), and all of them have fewer participants now than ten years ago.
- With the exception of jazz and opera, the greatest declines in population are in the 18-46 year age group.

Subscriptions

Although they are now a routine component of audience development initiatives, subscription sales have only been around for half a century or so. Subscription sales were primarily the brainchild of the Ford Foundation's McNeil Lowry and of Danny Newman, a Chicago-based communications consultant, who envisioned subscribers providing a stable base of financial support for nonprofit theaters, making it possible for theaters to spend more time on artistic development than on ticket sale and fundraising. Newman wrote *Subscribe Now! Building Arts Audiences Through Dynamic Subscription Promotion* (1977, Theatre Communications Group), still widely considered the most important book on subscriptions.

But many theaters and theater organizations – including Theatre Communications Group, which published Newman's book – have found that people are now more likely to buy single tickets than to buy subscriptions. This is particularly true of younger people, who are much more inclined than other generations to be more spontaneous in planning their activities and therefore less likely to buy advance tickets.

In its *Theatre Facts 2011*, an annual survey of performing arts theaters, Theatre Communications Group found that subscription attendance dropped 16 percent that year, with subscription revenues dropping by 11 percent (18 percent, adjusted for inflation). These are alarming statistics. TCG also found that *current* subscribers continue to renew: “If we focus only on productions offered on subscription, subscribers filled 32 percent of the capacity in 2011”, the report states. TCG concluded that the problem is essentially the need for a new subscriber acquisition model based on careful analysis of current subscribers, current single-ticket buyers, and current non-attenders.

The National Arts Marketing Project points out that about 60 percent of new theater subscribers do not renew their subscriptions. To retain them, it recommends giving first-time subscribers lots of care and attention the first year they subscribe. It suggests that theaters track them separately in their databases so that it is easier to send them special messages (e.g., to help them gradually become more familiar with the theater).

Some examples of successful subscription programs, and variations on subscriptions:

- In 2011, A Contemporary Theatre (ACT), in Seattle, began selling ACTPass, a membership-like card that gives pass holders a seat at any of ACT’s performances, depending on seat availability, for a monthly fee of \$25. The annual cost is the same as ACT’s typical subscription (\$300/year), but it gives pass holders schedule flexibility, they do not have to select dates in advance. The theater’s executive director, Gian-Carlo Scandiuzzi, says that it also feels like a better value to pass holders. “We hear, ‘This is great because now I come for free’,” Scandiuzzi says. “If you spend \$50 on a show, you think, ‘Was it worth it?’. But that idea is going away because patrons don’t have a financial transaction at the theater. They flash their pass and enjoy the show for what it is. Even if they don’t care for the show, they still won’t feel as though they’ve wasted what’s in their wallet.” ACTPass holders can also use their cards for concession discounts. Scandiuzzi reports that, for the theater, the monthly fees provide steady income throughout the year, helping alleviate short-term cash-flow problems.
- The Joffrey Ballet doubled its subscriber base in 2010 by selling a limited number of subscriptions through Groupon, and 30 percent of those who bought subscriptions renewed their subscriptions the following year. In an article in *The Washington Post*, the Ballet’s executive director, Christopher Clinton Conway, said, “These are truly seats we would never have sold. We were not cannibalizing our revenue.”
- The Barter Theatre (Abingdon, Virginia) offers five season passbooks:
 - The **5 to 30 Pass** offers a ticket to any four of the Barter’s performances for people between five and 30 years of age for \$92.

- The **Earlybird Pass** offers a ticket for any six of the first 12 shows of the season, for \$144.
- The **Value Pass** offers six tickets that can be used Sunday-Thursday (\$168).
- The **Anytime Pass** provides six tickets that can be used anytime (\$198).
- The **Porterfield Pass** offers one ticket for every main stage performance, plus six tickets for Barter Stage II, a historic former Methodist church that the Barter Theatre acquired in 1961 (\$280).

Group sales

Different theaters seem to have different opinions about whether to offer group sales or not. Even within the group of seven Iowa theaters that participated in Main Street Iowa's historic opera house initiative in 2013, several routinely offer group sales, while several others have never done so. But, most small US theaters do offer group sales. Group sales can help theaters reach new audiences, bring in revenue before a show's run begins and fill seats that would likely otherwise be empty.

The theaters that seem to be most successful with group sales (or that express greatest satisfaction with group sales) are those that seek out unconventional groups, such as book clubs, birthday parties, family reunions, social mixers, and neighborhood groups and that offer discounted group tickets for groups as small as ten people.

A few group sales examples and practice points from historic downtown theaters:

- The Howard Theatre (Washington, DC) offers an unlimited non-alcoholic beverage bar and dedicated wait staff for groups as small as ten.
- The State Theatre, in State College, Pennsylvania, offers group sales to groups with 20 or more people. Groups receive a 20 percent discount off regular ticket prices for most performances (10 percent for seniors and students, who are already eligible for discounted tickets), with two free tickets for every 30 group tickets purchased. Groups who purchase tickets before individual tickets go on sale receive priority seating.
- The Cottage Theatre (Cottage Grove, Oregon) offers a ten percent discount for groups of five to nine people and a 15 percent discount for groups of ten or more.
- Mad Cow Theater offers multi-show discounts for groups that book more than one show at a time, typically a 20 percent discount for the first show and a 30 percent discount for the second show.

New audiences

In *A New Framework for Building Participation in the Arts*¹, authors Kimberly Jinnett and Kevin McCarthy recommend reaching new audiences using one of three tactics – broadening participation, deepening participation, or diversifying participation, depending on the particular population the theater is targeting. Jinnett and McCarthy surveyed over 100 theaters and found that most of them use the same basic tactics to expand patron pools by increasing participation. They found that the problem, instead, was that they did not know which tactics were most effective for which types of people. They recommend these rules of thumb:

- For people not inclined to participate in the arts (e.g., people who tend to believe that the arts have little value for them), tactics to diversify participation are most effective. For these people, the biggest challenge is to reverse negative impressions of the arts (e.g., teenagers who believe that an “opera house” is for opera).

Best practices:

- Make connections between activities they already enjoy (such as sports, television, fashion, food etc.) and arts activities.
- Emphasize the theater’s role as a venue for social activity.

In almost all communities, this group – the group not currently participating in the arts – is the largest *potential* market for the theater.

- For people who *are* inclined to participate but who are not currently involved, tactics to broaden participation are most effective (e.g., making it logistically easier for them to participate).

Best practices:

- Identify and offer solutions to logistical barriers (e.g., lower ticket prices; childcare).
- Offer programming at different times of day.

- For people who currently participate in the arts, tactics to deepen participation are most effective (e.g., expanding their knowledge of the arts and strengthening their sense of connection to the theater).

Best practices:

- Offer pre and post-performance discussion groups.
- Send in-depth information about the performance beforehand to enhance ticket buyers’ knowledge about the event.
- Offer social events to enhance the feeling of inclusion in the theater.

Some examples:

¹ http://www.rand.org/content/dam/rand/pubs/monograph_reports/2005/MR1323.pdf

- The McPherson Opera House (McPherson, Kansas) offers a bring-a-friend promotion for its movie nights every other Thursday. Tickets cost \$5.00, and ticket purchasers can bring a friend for free.
- ACT (San Francisco) connected with a nearby restaurant to promote “A Christmas Carol”, which the theater was gearing up for a two-week holiday run. The theater sponsored a contest to send an entire family to a Sunday matinee of the show, followed by a Dickens-era English-themed dinner, accompanied by the actor playing Scrooge, at the restaurant. The restaurant offered the special themed dinner throughout the run, promoted by the theater in its emails, flyers and advertisements.
- Center Stage (Baltimore) promoted “Stones in His Pocket”, a play about two men in an Irish bar, by distributing coasters advertising the play in Irish bars throughout the Baltimore area. Ticket-buyers who brought the coaster to the play could use it to buy a pint of Guinness for two dollars.
- A growing number of theaters, including the Norma Terris Theatre (Chester, Connecticut), Guthrie Theatre (Minneapolis), and the Orpheum (Omaha) to name a few, reserve a special seating section in the back of the theater for people interested in live-Tweeting the performance. The Providence Performing Arts Center (Providence, Rhode Island) offers Tweet seats for free, finding that doing so generates additional interest in the performance and the theater.

“We’ve still got TWEET SEATS available for the Dec 4th performance of MEMPHIS! Email hmcguirl@ppacri.org. Space is limited so act fast!!”

- PPAC (@ProvPacRI) November 14, 2012

In some instances, the Twitter conversation is moderated (as was the case with the Goodspeed Opera House’s production of “Hello! My Baby”, in which the conversation was guided by the theater’s marketing manager, Elisa Hale. Opera Omaha makes free Tweet seats available during the final dress rehearsal of each production. Most theaters offering Tweet seats ask that Tweeters follow certain guidelines, like silencing phones, dimming screens, and focusing on encouraging conversation, rather than making negative comments.

- The Theatre Communications Group’s “Free Night of Theatre” began in 2005 in three cities, with the goal of attracting new audiences and broadening community appreciation for theater arts. More than 700 theaters now participate in the national program. In 2008, TCG commissioned a study to measure the event’s impact and to see if it was meeting its goals of attracting infrequent attendees of theater, young people and more diverse patrons. TCG found that the Free Night of Theatre met all its major goals. For example, 78 percent of the people receiving a free ticket reported that they had gone to a theater since the program. Of these people, 42 percent consider themselves infrequent theater attendees (going less

than two times in the past year). While some of the participating theaters were afraid that giving away tickets would discourage people from buying full-price tickets later, TCG found that, when participants next attended the theater, 40 percent bought full-price tickets and nine percent bought subscriptions (the remaining 51 percent bought some sort of discounted ticket, such as student or senior tickets).

- Chad Bauman, the director of communications for Washington, DC's Arena Stage has developed a marketing approach that involves inviting "initiators" to special previews of new performances. Bauman defines an "initiator" as someone who is likely to talk about the show with others and as someone who not only has a large number of followers on social media sites like Facebook or Twitter but who initiates and actively engages people in conversations there. Bauman invites these people to a small, exclusive preview before each new show, giving them a behind the scenes view of the whole production and doing his best to make the preview feel like a very special event. He gives each person a "5 Ways to Spread the Word" flyer and discount coupons for an upcoming performance. A couple of days after the preview, he emails each of the initiators a personalized thank-you message, reiterating the "5 Ways". Bauman reports that, while the average email open rate for messages promoting a show is typically 18-20 percent, the open rate for Arena's initiators' email messages is 25 percent. He says that they target different types of initiators for different types of performances – so, for example, the theater might seek out people who can reach tourists for one production, then people who can reach teens for another production.

Some best practice suggestions for developing new audiences:

- **Tailor marketing strategies to specific audiences:** Use different marketing strategies for different audiences – even for the same performance. Albuquerque, New Mexico's Working Classroom found that young people bought tickets to performances when performances were advertised in a local independent weekly newspaper, while older generations relied on the community's daily newspaper for ticket information.
- **Focus marketing tightly on specific types of audiences:** Some theaters report that, by focusing less on increasing numbers and focusing more on targeting specific types of audiences, they have ultimately been able to broaden their marketing bases.
- **Commit to multi-year strategies:** While a theater might succeed in persuading someone not inclined to patronize a theater to buy a ticket once, turning that person into a regular theater-goer is considerably more difficult and usually requires careful cultivation over a period of years. The Seattle Repertory Theatre launched an initiative to persuade first-time ticket-buyers to buy a ticket for another performance that season. Their marketing focused simply on the message "Come back this season", and they were able to persuade 11 percent of first-time ticket-buyers to do so. They did not ask these people to subscribe or to make a donation; they kept their message simple and direct. In the second year of their campaign, they offered "Come (back) to three plays for \$99". Again, they did not even mention

subscriptions or contributions. They were able to persuade 30 percent of their target group to buy the three-play package. In the third year, they asked their target group to subscribe, being careful to pitch the subscription more as a customer service than a sale. Eight percent of their target group bought subscriptions (versus only two percent of other first-time attendees). In year four, they asked the new subscribers in their target group to renew their subscriptions, and an amazing 81 percent did so.

Young audiences

Some examples of successful programs designed to attract young audiences:

- Salvage Vanguard Theatre (Austin, Texas) has recorded and released CDs of songs from several original musicals it has produced, generating buzz before the musicals even open.
- The Sheridan Opera House (Telluride, Colorado) has a Spotify feed of songs from upcoming Opera House performers on its website (www.sheridanoperahouse.com).
- In 2013, the Stratford Festival (Stratford, Ontario) offered jump-the-line tickets to its Facebook fans using TN Social Ticketing, a Facebook ticketing app. More than 3,600 people downloaded the app, and the Festival increased its revenues by \$92,000.
- The Theatre Communications Group's Audience (R)evolution initiative studies, promotes and supports audience engagement models, with particular emphasis on developing younger audiences. The initiative, which evolved from an earlier program called Future Audiences, has provided over \$7 million in grants to help theaters attract younger audiences. Some examples of the young audience development activities (R)evolution has supported:
 - Barrington Stage Company (Pittsfield, Massachusetts) received a grant from TCG to launch Barrington Stage 2.0, a series of activities and initiatives targeting people under 35. It includes a free membership program - #bsc35 – that offers ticket discounts; an iCritic booth in the lobby; and expansion of Barrington Stage Company's social media presence.
 - New Paradise Laboratories (Philadelphia) is an experimental ensemble that produces edgy productions that make heavy use of new technology to enhance visual imagery and create illusions that force audiences to re-think what they see. NPL used its grant from TCG to help build FRAME, an online performance platform that lets audiences collaborate with performers in shaping performances. FRAME's productions include "Fatebook: Avoiding Catastrophe One Party at a Time", in which audiences weave through a series of suspended screens on which live-action Facebook-like posts are projected, and "Extremely Public Displays of Privacy", whose three acts take place online (Act 1), as a self-guided podcast-based walking tour in downtown Philadelphia (Act 2), and as a live performance in a theater.

- Epic Theatre Ensemble (New York) developed Gateway, a mobile theater, to bring free productions to young, first-time theater attendees.
- Woolly Mammoth Theatre Company (Washington, DC) has used technology in its lobby to attract the attention of young people.

There is a helpful LinkedIn discussion group – “Regional Theatre Group Sales and Audience Development” – where theater staff and volunteers exchange audience development ideas (www.linkedin.com/groups/Regional-Theatre-Group-Sales-Audience-2606005).

A U D I E N C E R E S E A R C H

Learning more about a theater's current ticket buyers and potential ticket buyers is crucial to finding ways to develop new audiences, retain current audiences, and increase audience involvement – particularly given the changing preferences of young audiences, in particular.

There are many possible ways to gather information. In a 2005 survey of over 100 theaters, arts researchers Kimberly Jinnett and Kevin McCarthy found that almost all of these 100-plus theaters gather information from participants through five primary means:

Informal means:

- Staff discussions
- Community discussions
- Community advisory committees

Formal means:

- Surveys
- Focus groups

Informal research is easier to conduct than formal research – you talk with theater patrons, people in the community, and community organizations and gather ideas and information from them. But people might be inclined to tell you what they think you would like to hear, rather than what they really think and feel. Formal research is more difficult to conduct and, if you hire a research firm or consultant, it can be more expensive - but it provides invaluable information.

Audience surveys: Audience surveys offer critical information on the demographic characteristics, programming preferences, and price-point sensitivity of a theater's *current* patrons. They are therefore most useful for retaining a theater's current audiences.

A few recommendations for audience surveys:

- Gather some basic demographic information about survey respondents by asking them about their age category, gender, household income range and place of residence. Ask for this information at the end of the survey.
- Include a check-all-relevant-boxes question asking what other events survey respondents have attended *at this theater* within the past two years. This could provide important information about the demographic characteristics of people who patronize different types of events at the theater.

- Include a open-ended question asking what other performing arts events survey respondents have attended within the past year, whether at this theater or another theater or performance venue.
- Train ushers to encourage people to complete the surveys – and to have pencils on hand.

A few examples:

- TheatreWorks New Milford, in New Milford, Connecticut, conducts a brief online survey² that can be completed in less than five minutes. The survey asks for feedback not just on the production the person just watched but also on how comfortable the theater is, how convenient parking is and other characteristics of the overall experience of visiting the theater. It also asks respondents to provide information on how often they attend theater events and on which theaters they visit. It offers an incentive, also – by providing their names and email addresses, respondents can win tickets to upcoming productions.
- The Hampstead Theatre, north of London, conducts a targeted survey of patrons under 26 years of age³. Among its questions: “What prevents you from going to the theater?”

Audience surveys can provide valuable guidance not only on programming preferences but also on other ways the theater might better meet the needs and fulfill the interests of its current customers. The Cutting Ball Theatre, an avant-garde community theater in San Francisco, found in its surveys that patrons did not always understand their productions. The theater began sending email messages to ticket purchasers in advance of the show, providing more information about the production and posing thought-provoking questions, and launched a discussion series in conjunction with each production.

Non-audience surveys: Audience surveys provide very valuable information on the demographic characteristics and programming preferences of current theater patrons – but it is also important to find out about the interests and impressions of community residents and visitors who do *not* currently patronize the theater.

In *A New Framework for Building Participation in the Arts* (see “Audience Development”), Jinnett and McCarthy point out that, in order to know which tactics are likely to be most effective in building a new audience, the theater must understand why someone is not currently a theater patron – and, specifically, if it is because he or she has negative attitudes about the theater (e.g., teenagers who perceive an opera house to be elite or old-fashioned) or because he or she has logistical problems with participating (e.g., ticket prices are too high, or they would need childcare in order to attend performances).

² <http://theatreworks.us/survey.php>

³ <http://hampsteadtheatre.com/news/2013/06/survey-under-26-we-need-your-feedback/>

A useful publication on this topic is *Building Arts Organizations That Build Audiences*, published by The Wallace Foundation in 2012 and available online for free⁴. The publication summarizes discussions with winners of its Wallace Excellence Awards, a grant program that recognizes successful audience development initiatives. It includes all types of arts organizations (not just theaters but also museums, dance companies, and other organizations), and most of its examples are from six large cities – but these examples nonetheless include some good ideas for theaters in smaller towns. For example:

- Chicago’s Steppenwolf Theatre, which is known for presenting edgy and challenging plays, learned through audience research that most of its frequent patrons consider themselves to be lifelong learners. With this information, Steppenwolf began offering conversations after each performance, coaching participants to talk about questions they have about the play. In the two years after the theater began offering post-play discussions, the number of non-subscribers buying tickets to more than one performance per season grew by 61 percent.
- The Pacific Northwest Ballet organized a series of focus groups with teenagers to ask for their reactions to the company’s production of “The Nutcracker”. The teens gave them harsh, blunt feedback on everything from ticket pricing to advertising design (which they called “bad Photoshop”). As a result of these focus groups, the Ballet launched an initiative to change teens’ negative stereotypes about ballet, offering teen-only events, inviting teens to watch rehearsals, seating teens in good seats (rather than in the most inexpensive seats in the theater), redesigning the website and training ticket booth and concession sales volunteers and ushers to give teens an especially warm welcome to the theater. One of the most successful components of the initiative involved launching a young critics workshop, teaching teens about critical feedback and inviting them to blog their performance reviews on the Ballet’s website.

There are a number of ways theaters might survey people who do not currently visit the theater. Online survey tools like SurveyMonkey make it easy to design and post surveys, with the survey site address circulated through email lists, news media, newsletters and other sources. For those without computer access, the theater can make paper copies of the survey available. If the theater wishes to obtain survey responses that represent the overall population of the community or region, it should include some questions about the demographic characteristics of the survey respondent. It can then compare the demographic characteristics of survey respondents with those of the overall area, soliciting additional responses from targeted groups to round out the respondent group. And/or, rather than surveying the entire community, a theater might conduct surveys of one or more specific groups – like teenagers, young parents, seasonal visitors or downtown workers.

⁴ <http://www.wallacefoundation.org/knowledge-center/audience-development-for-the-arts/strategies-for-expanding-audiences/Documents/Building-Arts-Organizations-That-Build-Audiences.pdf>

Focus groups

Focus groups bring together a dozen or so people with a skilled facilitator to learn about the group's opinions about a topic. Groups usually consist of people with similar characteristics, and the facilitator asks the group a series of questions about their perceptions, opinions, attitudes and ideas about the topic.

It is important to find a skilled facilitator – someone without personal bias who can guide the conversation, ensuring that the discussion is not dominated by one or more people, that it stays on topic and that it answers most or all of the key questions for which the focus group is being conducted.

Several years ago a journalism class at the University of Wisconsin/Oshkosh conducted community surveys (online, using SurveyMonkey) and focus groups to help develop a marketing plan for Oshkosh's historic Grand Opera House, which was then in the process of being rehabilitated. The students' work was invaluable in helping the theater, whose programming and events are shaped by many of their discoveries.

Resource:

Britain's Independent Theatre Council has published a thorough handbook, *Capturing the Audience Experience: A Handbook for the Theatre*, on conducting audience research, available online⁵ at no cost. It focuses primarily on programming, rather than on the experience of the theater facility or the overall experience of visiting a theater.

There are a number of guides for conducting focus groups available online, including one prepared by Rowan University⁶ and one by the University of Wisconsin⁷.

⁵ <http://www.itc-arts.org/uploaded/documents/Theater%20handbook.pdf>

⁶ <http://www.rowan.edu/colleges/chss/facultystaff/focusgrouptoolkit.pdf>

⁷ http://www.uwsuper.edu/cipt/exsite/upload/Focus_Group_Guidelines.pdf

B L O C K B O O K I N G

When a group of theaters books a performance together, the theaters usually save money, since performers and production companies are often willing to lower their per-theater prices with the guarantee of being able to offer several performances within the same region. But block booking offers plenty of other benefits. For example, block booking makes it possible for theaters to bring a wider range of performances to their communities. It helps them develop ongoing relationships with a larger number of performers and production companies. And, it strengthens the ongoing working relationships between theaters.

During a webinar on block booking conducted for historic theaters in seven Iowa Main Street communities in December 2013, webinar instructor Jan Sawyer (former executive director of the Rialto Theatre in downtown Loveland, Colorado) offered several key guidelines for block booking:

- Actively communicate with one another about your programming schedules, plans and goals.
- Include other theaters within the region – not just in Iowa but in neighboring states, as well.
- Talk with colleges and universities that might serve as the anchors for a booking block within the region. Colleges and universities often book performers who might then be open to booking performances at smaller venues within the region.
- Get involved in regional presenter organizations, particularly Arts Midwest. Arts Midwest organizes state-by-state meetings in conjunction with its annual conference (usually held each September) so that theaters can work on block booking together.
- Develop relationships with national and regional booking agencies.
- Enter into all booking relationships with honesty and integrity. Never renege on an agreement.
- Negotiate!
- Have patience - it takes time to get going.
- Don't let booking agents or other venues pressure you into booking a performance that isn't a good fit for your theater or your community.
- Don't *ever* pull out of a block after you have committed to it.

Some block booking examples:

- The Fox Theatre in Atlanta was instrumental in creating Georgia Presenters, a statewide block booking consortium. Any nonprofit theater that presents three or more professional touring artists or shows annually can join the consortium, whose members include theaters in neighboring states. Members have access to an annual presenters showcase, a website where theaters can post information about performances they are considering booking, and occasional training workshops on topics of interest to staff and volunteers of historic theaters. The consortium is managed by the Fox Theatre Institute, a subsidiary of the Fox Theatre.

- The Kansas Historic Theatre Association, a nonprofit organization, informally facilitates block booking among its members.

- Some state arts councils, such as those in Mississippi and Arkansas, help performing arts presenters coordinate their programming through block booking.

BOARDS + COMMITTEES

This topic could fill several books and manuals – and, of course, there have been hundreds of books published on nonprofit board and committee management, including some specifically on theater management.

There are a number of things common to most (if not all) nonprofit boards of directors which apply to the boards of historic theaters, also, such as:

- Determining the organization’s mission and priorities
- Establishing fiscal policies, budgets and financial controls
- Setting policies for the organizations operation
- Developing strategic, fundraising, marketing and communications plans to advance the organization’s agenda
- Creating, providing guidance to, and participating in committees to carry out the organization’s agenda
- Hiring and evaluating staff
- Ensuring that the organization has sufficient funding to accomplish its mission

For historic theaters, there are a few specific things to keep in mind:

- The skills needed to rescue and rehabilitate a historic theater are not necessarily the skills needed to operate a performing arts center. Once a historic theater has been rehabilitated and reopened, it will have a continuing need for some board members with the skills to maintain a historic building – but it will also need board members knowledgeable about theater programming, audience development, marketing and other aspects of performing arts center administration.
- In communities in which there has been no major, active performing arts facility for a number of years, a generation or more of residents might have no experience of live performances and might be unsure of or oblivious to the ways in which a theater can enrich their lives and benefit the community. In places like this, one of the board’s challenges will be not just to provide programming of value to the community but also to establish (or reestablish) the theater as a vital part of the community.

And, the boards of directors of emerging theaters (theaters that have recently been rehabilitated and reactivated) face somewhat different challenges than those of established theaters. For example, the boards of emerging theaters need to create the policies, committee structure, membership structure and other fundamental tools that the theater will need in order to take root in the community and grow. The boards of established theaters have fewer operational issues to deal with, but they often have greater responsibilities for raising money, evaluating and adjusting programming and developing new audiences.

There are many variations on committee structure among historic theaters. In general, historic theaters need committees that can handle the following major responsibilities:

- Maintaining the building
- Determining programming
- Marketing (both the historic theater itself *and* the theater's programming)
- Managing the theater's finances
- Identifying and recruiting board and committee candidates

There are one or two core responsibilities that are sometimes handled by committees but that are more often handled by the board itself, such as fundraising and long-range planning.

For both boards and committees, it is good practice to choose people with a diversity of skills and interests and who, to the extent possible, reflect the demographic characteristics of the community. It is also wise to seek out and include people who represent the audiences the theater is trying to develop.

There are many theories about and approaches to selecting good committee members. One approach that seems to work well for historic theaters is to try to get a mix of people with the following work habits:

- "Affiliators": People who enjoy being around other people and working in a group
- "Achievers": People who prefer working alone and can be relied upon to complete specific tasks thoroughly and efficiently
- "Power people": People who have the power (or access to the power) to expedite things

Halsey and Alice North, of The North Group, developed the following list of board commitments for the Maui Arts and Cultural Center and recommend that members of theater boards make the following commitments:

- Know, respect, uphold and support the theater's mission, goals and programs
- Attend board meetings regularly
- Serve on at least one committee each year
- Participate in fundraising activities, including special events
- Subscribe to and attend many of the theater's series events each year
- Make an annual financial gift to the theater at a level that is personally significant
- Support any other fundraising campaigns of the theater in addition to the annual commitment (100 percent board participation is critical to every campaign)
- Be a good will representative for the theater and its activities in the community
- Understand the budget and finances
- Enjoy the opportunity to participate on the board
- Enjoy the opportunity to network, host, and entertain friends, business associates and other leaders in the community

- Be fully informed about the responsibilities, time commitment and the organization before accepting a board member position
- Have opportunities for orientation and continuing board training in order to function effectively as a board member
- Be kept fully informed through accurate financial and management reports, regularly presented, and thorough briefings by staff about the operation of the organization
- Expect that time will not be wasted by lack of planning, coordination, and cooperation within the organization or within the board
- Be assigned worthwhile and challenging tasks with the freedom to use existing skills or develop new ones
- Be recognized appropriately for my work and involvement as a board member
- Have fun!

Resource:

BoardSource.org has an extensive library of publications and sample/template documents for boards of directors, including publications on fiduciary responsibilities, bylaws, policies, legal/compliance issues, board member recruitment, and tax exemption. Many of its publications are free.

C H A R T O F A C C O U N T S

A recommended accounting chart of accounts for theaters:

Account number and description	Type
1000 · Petty cash	Bank
1005 · Cash - Registers	Bank
1006 · Cash - Other	Bank
1010 · Checking account	Bank
1030 · Savings account	Bank
1045 · Undeposited Funds	Bank
1055 · Checking - (restricted funds)	Bank
1100 · Accounts receivable	Accounts Receivable
1140 · Theater Rental	Accounts Receivable
1150 · Advertising	Accounts Receivable
1160 · Ticket Sales (consignments)	Accounts Receivable
1170 · Pledges	Accounts Receivable
1180 · Pledge Allow/Discount	Accounts Receivable
1190 · A/R Other	Accounts Receivable
1060 · Investment accounts	Other Current Asset
1255 · Utility Deposit	Other Current Asset
1300 · Concession Inventory	Other Current Asset
1400 · Prepaid expenses	Other Current Asset
1405 · Prepaid Interest	Other Current Asset
1410 · Prepaid Real Estate Taxes	Other Current Asset
1415 · Prepaid Expense - Other	Other Current Asset
1420 · Prepaid Film	Other Current Asset
1425 · Prepaid Artist	Other Current Asset
1430 · Prepaid Insurance	Other Current Asset
1435 · Prepaid Marketing	Other Current Asset
1450 · Prepaid Special Events	Other Current Asset
1460 · Accountants Prepaid Artists	Other Current Asset
1610 · Land	Fixed Asset
1620 · Building	Fixed Asset
1630 · Office Fixtures & Equipment	Fixed Asset
1640 · Office IT Equipment	Fixed Asset
1650 · Theatrical Equipment	Fixed Asset
1710 · Accumulated Depreciation - Land	Fixed Asset
1720 · Accumulated Depreciation - Building	Fixed Asset
1730 · Accumulated Depreciation - Office F&E	Fixed Asset
1745 · Accumulated Depreciation - Office IT Equip	Fixed Asset
1750 · Accumulated Depreciation - Theatrical Equip	Fixed Asset
1760 · Amortizable Asset	Other Asset
1780 · Accumulated Amortization	Other Asset

1790 · CIP Loan Fees	Other Asset
2000 · Accounts Payable	Accounts Payable
2050 · Event A/P	Accounts Payable
2100 · Accrued Expenses - other	Other Current Liability
2200 · Accrued Payroll	Other Current Liability
2300 · (Accrued) Sales Tax Payable	Other Current Liability
2350 · Deferred Rev - Restricted	Other Current Liability
2400 · Deposits Received	Other Current Liability
2410 · Gift Certificates - Deposits	Other Current Liability
2420 · Ticket Sales - Deposits	Other Current Liability
2430 · Box Office Fee - Deposits	Other Current Liability
2440 · Theater Rental Deposit	Other Current Liability
2450 · Special Events - Deposits	Other Current Liability
2460 · Sponsorship - Deposits	Other Current Liability
2500 · Payroll W/H	Other Current Liability
2505 · Fed Tax W/H - Employee	Other Current Liability
2510 · Local Tax W/H - Employee	Other Current Liability
2515 · FICA W/H - Employee	Other Current Liability
2516 · Employer FICA W/H	Other Current Liability
2520 · PA Tax W/H - Employee	Other Current Liability
2525 · EMST W/H - Employee	Other Current Liability
2530 · PUCF Tax W/H - Employee	Other Current Liability
2531 · Employer PUCF Tax W/H	Other Current Liability
2535 · Health Ins W/H - Employee	Other Current Liability
2540 · Sup/Wage Att - Employee	Other Current Liability
2545 · Other W/H - Employee	Other Current Liability
2800 · LOC	Long Term Liability
2810 · Bank Loan	Long Term Liability
2820 · Bank Loan	Long Term Liability
3000 · Unrestricted Net Assets	Equity
3100 · Temporarily Restrict Net Asset	Equity
3110 · Use Restricted Net Assets	Equity
3120 · Time Restricted Net Assets	Equity
3200 · Permanently restrict net assets	Equity
3210 · Endowment net assets	Equity
3900 · Retained Earnings	Equity
4000 · Ticket Sales	Income
4005 · Film	Income
4010 · Live Event	Income
4100 · Box Office Fee	Income
4200 · Concessions Sales	Income
4205 · Concessions Rebates	Income
4210 · Event Merchandise Net	Income

4300 · Theater Rental	Income
4400 · Advertising Revenues	Income
4450 · Program/Event Schedule Ad	Income
4500 · Program Sponsorship	Income
4600 · Programming Grant	Income
4900 · Interest Income	Income
4950 · Other Income	Income
5000 · Event Expense	Cost of Goods Sold
5002 · Agent Fee	Cost of Goods Sold
5004 · Film Acquisition	Cost of Goods Sold
5006 · ASCAP/BMI	Cost of Goods Sold
5008 · Artist Fee	Cost of Goods Sold
5010 · Hospitality	Cost of Goods Sold
5014 · Advertising	Cost of Goods Sold
5016 · Ad Production	Cost of Goods Sold
5018 · Single Event TV Ad	Cost of Goods Sold
5020 · Single Event Radio Ad	Cost of Goods Sold
5022 · Single Event Print Ad	Cost of Goods Sold
5024 · Event Advertising - Other	Cost of Goods Sold
5026 · Backline (on stage)	Cost of Goods Sold
5028 · Production Equipment Rental	Cost of Goods Sold
5030 · Outside Labor	Cost of Goods Sold
5032 · Technical Labor	Cost of Goods Sold
5034 · Event Parking	Cost of Goods Sold
5036 · Event Security	Cost of Goods Sold
5038 · Event Shipping/Postage	Cost of Goods Sold
5040 · Misc Event Expense	Cost of Goods Sold
5042 · Event Credit Card Processing	Cost of Goods Sold
5050 · Event Payroll	Cost of Goods Sold
5052 · Wages - Stage	Cost of Goods Sold
5054 · Wages - Lighting	Cost of Goods Sold
5056 · Wages - Sound	Cost of Goods Sold
5058 · Wages - Projection	Cost of Goods Sold
5060 · Wages - FOH	Cost of Goods Sold
5062 · Payroll Taxes	Cost of Goods Sold
5064 · Employee Benefits	Cost of Goods Sold
5066 · Work Comp Insurance	Cost of Goods Sold
5800 · Concessions	Cost of Goods Sold
5810 · Inventory Adjustment	Cost of Goods Sold
6000 · Payroll	Expense
6010 · Administrative Payroll	Expense
6025 · Wages - Operational FOH	Expense
6030 · Wages - Office	Expense

6035 · Wages - Sales/Marketing	Expense
6040 · Wages - PT - Other	Expense
6045 · Employee Benefits	Expense
6050 · Payroll Taxes	Expense
6060 · Work Comp Insurance	Expense
6700 · Professional Fees	Expense
6705 · Payroll Consulting	Expense
6710 · Attorney Fees	Expense
6750 · Accounting Fees	Expense
6760 · Continuing Education	Expense
6770 · Credit Card Processing Fee	Expense
6780 · Bank Service Charge	Expense
6790 · Interest Expense	Expense
6792 · Bank Loan Interest	Expense
6794 · Bank Loan Interest	Expense
6796 · Bank Loan Interest	Expense
7000 · General Theater Expenses	Expense
7095 · Choice License Fee	Expense
7100 · Equipment Lease	Expense
7110 · Office Supplies	Expense
7115 · General Operations Expenses	Expense
7120 · Outside Services	Expense
7130 · Communications	Expense
7132 · Telephone	Expense
7134 · Cellular Phone	Expense
7136 · Internet	Expense
7140 · Postage, Shipping, Delivery	Expense
7150 · Website Maintenance	Expense
7170 · Printing & Copying	Expense
7180 · Dues & Subscriptions	Expense
7185 · Employee Parking	Expense
7190 · Employee Gifts	Expense
7195 · Misc Theater Expense	Expense
7200 · Over/Short	Expense
7300 · Building & Occupancy	Expense
7305 · Housekeeping	Expense
7350 · Utilities	Expense
7355 · Gas	Expense
7360 · Electric	Expense
7365 · Water	Expense
7370 · Sewer	Expense
7375 · Refuse	Expense
7380 · Cable	Expense

7430 · Building Repairs	Expense
7440 · Building Maintenance	Expense
7450 · General Maintenance	Expense
7455 · General Maintenance Supplies	Expense
7470 · HVAC	Expense
7475 · Security System	Expense
7480 · Property Taxes	Expense
7485 · Property Insurance	Expense
7490 · GL Insurance	Expense
7495 · Other Misc - B&O	Expense
7500 · Travel & Meetings Expenses	Expense
7505 · Travel	Expense
7510 · Conference, Convention, Meeting	Expense
7525 · Small Equipment Expense	Expense
7550 · General Stage/Equip Maintenance	Expense
7600 · General Advertising	Expense
7605 · Print	Expense
7610 · TV/Radio	Expense
7615 · Web Advertising	Expense
7620 · Advertising - Other	Expense
7650 · Program/Event Schedule Advertising	Expense
7800 · Depreciation Expense	Expense
9000 · Development Income	Other Income
9005 · Pledges	Other Income
9010 · Naming Opportunity	Other Income
9030 · Donations	Other Income
9035 · Donations In Kind	Other Income
9040 · Restricted Use Gifts	Other Income
9045 · Grants	Other Income
9047 · Corporate/Business Grants	Other Income
9049 · Foundation/Trust Grants	Other Income
9051 · Local Government Grants	Other Income
9053 · State Grants	Other Income
9055 · Federal Grants	Other Income
9075 · Special Events	Other Income
9999 · Control Revenue Account	Other Income
9500 · Development Expense	Other Expense
9505 · Development Admin Payroll	Other Expense
9510 · Payroll Taxes	Other Expense
9515 · Employee Benefits	Other Expense
9520 · Work Comp Insurance	Other Expense
9525 · Other Development Expenses	Other Expense
9535 · Special Events Expense	Other Expense

CONFLICT OF INTEREST POLICIES

Board members and volunteers are often unaware that some of their activities or interests might be in conflict with the theater's best interests. Because of the nonprofit status of most historic theaters, it is important that their boards of directors adopt a conflict of interest policy.

Here is an example from the Egyptian Theatre:

Full Disclosure

Board members and staff members in decision-making roles should make known their connections with groups doing business with the organization. This information should be provided immediately and reviewed annually.

Board Member Abstention from Discussion and Voting

Board members who have an actual or potential conflict of interest should not participate in discussions or vote on matters affecting transactions between the organization and the other group.

Staff Member Abstention from Decision Making

Staff members who have an actual or potential conflict should not be substantively involved in decision making affecting such transactions.

Be sure that board meeting minutes always reflect whenever a board member states that he or she has a conflict of interest and explain how the conflict was handled (e.g., the board member left the room for the relevant discussion, the board member abstained from the vote, etc.). Also, some theater boards ask their members to complete an annual questionnaire that, among other things, asks about any circumstances which might create a conflict of interest or the appearance of a conflict of interest (for example, if a board member's business is a vendor to the theater).

EDUCATION PROGRAMS

Theaters that sponsor education programs report that doing so offers several important benefits:

- It enhances the skills of the community's actors, directors, writers, and technical volunteers.
- It expands the numbers of people involved with the theater – particularly younger people.
- It helps broaden the theater's potential pool of volunteers.

By supplementing school-based performing arts education, theater-based education programs have important community development benefits, as well. And, many theaters have found that there are often individuals, businesses, and organizations interested in supporting educational programs who might otherwise not be interested in supporting theater operations.

A few examples:

- The Cheboygan Opera House (Cheboygan, Michigan) offers a variety of youth programming. One of its most popular programs, Access to Arts, makes three days of programming available for free to all school children in Northern Michigan, thanks to support from Citizens National Bank, the Michigan Humanities Council, and the Michigan Council for Arts and Cultural Affairs. The opera house also offers a scholarship for advanced arts study for high school students, underwritten by a bequest from a community resident.
- The Waterville Opera House (Waterville, Maine) offers a creative movement program for children 1-4 years of age, guiding the children through activities that involve singing, dancing and playing simple percussion instruments.
- The Stonington Opera House (Stonington, Maine) holds an annual workshop for teachers within the region on using drama in the classroom. The Opera House organizes several other events aimed at youth education, including a popular annual student film festival open to filmmakers in grades 6-12.
- Stuart's Opera House (Nelsonville, Ohio) offers an after-school music education program, teaching students to play bass guitar, lead guitar, keyboards or drums. The popular program plans to add songwriting classes in the near future. While open to all high school students, the program places particular emphasis on developing participation from teens from lower income families.

EMERGENCY PROCEDURES

All public assembly places have unusual and specific safety regulations. With audiences in a concentrated location and with extensive lighting, sound and other electrical demands, exit protocols are particularly important in theaters, churches, town halls and other places where lots of people gather. It is therefore critical that one of the top priorities of a historic theater be to ensure the safety of patrons, performers, volunteers and staff, once the theater is put back in service.

All theaters should develop a plan for handling emergencies – for evacuating the theater in case of a fire; for using the theater as a shelter (if appropriate) in case of a hurricane; for helping patrons, staff, volunteers or performers in case of personal injury; for determining whether it is better to evacuate the theater or use it to shelter in place in emergencies like hurricanes, earthquakes or terrorist attacks.

Some best practices:

- Proctor’s Theatre (Schenectady, New York) requires that all volunteers attend a mandatory training program on emergency procedures before they are permitted to serve as volunteers. For every performance, Proctor’s also maps the seat assignments of patrons with disabilities and places the map in the ticket booth, where it can be easily accessed by firefighters and other emergency workers in the event of an emergency.
- The Garden Theatre (Winter Garden, Florida) provides instruction to all volunteers in three key safety-related categories:
 - Personal injury (e.g., if a patron trips or falls)
 - Tornadoes and wind-related events
 - Fire emergencies

The theater has written a detailed emergency handbook in the event further guidance is needed; this is kept in the theater’s concession area, where it can be easily retrieved by emergency personnel.

- When it comes to emergency procedures, the Count Basie Theatre, in Red Bank, New Jersey, must win the prize for being thorough. The theater has developed a 40-page crisis management plan, spelling out procedures to follow in the event of medical emergencies, bomb threats, earthquakes, fires, floods, hurricanes and tornados. It lists the specific responsibilities for each of the theater’s staff and includes evacuation plan maps and maps of the fire extinguisher and hose locations. It includes a crisis communications plan, with guidelines on how to talk with the media, and what generally to say (and not say) within 24 hours and 48 hours of the crisis. And, it includes an audience bill of rights, which includes

several points related to safety and emergencies (for example: “Audience members should observe general safety precautions, such as paying attention when walking through parking lots, avoiding suspicious characters or areas with no light and traveling with a companion in the evening. Staff members will walk persons who are uncomfortable to their cars. The outer lobby will remain open for audience members waiting for a ride.”) The bill of rights is posted in the theater’s lobby.

- Be sure that rental contracts spell out important safety practices that the renter should follow.

Here’s an example from the rental agreement for Frankfort, Kentucky’s Grand Theatre:

Section XVII – EMERGENCY PROCEDURES

1. In the event of an emergency, the House Manager and all other LESSEE staff will follow the prepared emergency evacuation procedures to safely assist patrons and performers in leaving the facility.
2. No portion of any passageway or exit shall be blocked or obstructed in any manner whatsoever and no exit door or any exit way shall be blocked (either partially or completely), locked or bolted when the facility is in use. Moreover, all designated exit ways shall be maintained in such a manner as to be visible at all times. No exit sign or visual indication of such may be obscured, blocked or reduced. These rules apply to both patron use and backstage use spaces.
3. LESSEE and its employees, staff and other entities agree to follow the directions of the GRAND’s staff, security personnel or signage in the event of an emergency situation.
4. LESSEE assumes all responsibility that its subcontractors do not obstruct exits and paths of emergency egress in any manner including, but not limited to, the placement of equipment, road boxes, support structures and personnel.
5. LESSEE shall assume responsibility for all temporary cables and wiring being run for this event to be enclosed in appropriate cable covers or otherwise secured in all pedestrian traffic areas both backstage and in the auditorium/lobby.

A good resource:

Theatre Alberta, in conjunction with Alberta Human Services, in Canada, has developed a helpful publication about theater safety, called *Safe Stages*. The publication is available in PDF format, for free, from Theatre Alberta’s website:

<http://www.theatrealberta.com/safe-stages/>



Troy Savings Bank Music Hall Incident Report

Report Day _____
Incident Day _____

Date _____
Date _____

Time _____
Time _____

INCIDENT CATEGORY (check one)

- | | | | |
|---------------------------------|--|--|---|
| <input type="checkbox"/> Aided | <input type="checkbox"/> Confrontation | <input type="checkbox"/> On-Site Condition | <input type="checkbox"/> False Alarm/Bomb Scare |
| <input type="checkbox"/> Fire | <input type="checkbox"/> Security | <input type="checkbox"/> Water/Ice/Snow | <input type="checkbox"/> Equipment |
| <input type="checkbox"/> Weapon | Other: _____ | | |

Place of Occurrence _____

Weather Conditions _____

Equipment Involved _____

CHECK ONE: COMPLAINANT AIDED

Name _____

Home Address _____

Day Phone _____ Eve Phone _____

WITNESSES Yes No (List additional witnesses on back)

Name _____

Home Address _____

Phone _____

DESCRIPTION / STATEMENT (use back of page if more space is necessary)

Signature _____ Date _____

Responding Personnel Name _____ Shield # _____

Report Filed By _____

Copies to: Executive Director Facilities TSBMH Foundation Reporting staff member

AIDED / RESPONSE Handled Internally Responding: Police Fire EMT

Nature of Injury	
Abrasion	<input type="checkbox"/>
Bruise	<input type="checkbox"/>
Burn	<input type="checkbox"/>
Concussion	<input type="checkbox"/>
Dislocation	<input type="checkbox"/>
Fracture	<input type="checkbox"/>
	Incised Wound <input type="checkbox"/>
	Laceration <input type="checkbox"/>
	Puncture Wound <input type="checkbox"/>
	Scratches <input type="checkbox"/>
	Sprain <input type="checkbox"/>
	Strain <input type="checkbox"/>

Part of Body Injured		Left	Right
Abdomen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Head	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Ankle <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Arm <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Foot <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Knee <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Leg <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Wrist <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

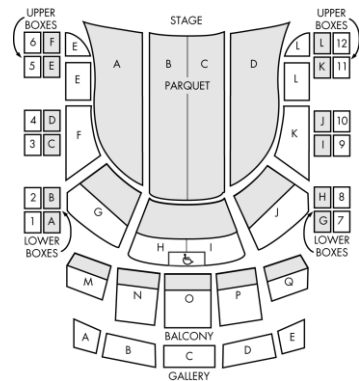
Other _____ Other _____

Patient taken to	<input type="checkbox"/> Samaritan	<input type="checkbox"/> Ellis	<input type="checkbox"/> Other _____	<input type="checkbox"/> no transport
911 called	<input type="checkbox"/> no	<input type="checkbox"/> yes	unit# _____	Police on scene <input type="checkbox"/> no <input type="checkbox"/> yes badge # _____
<input type="checkbox"/> treated	<input type="checkbox"/> recalled	<input type="checkbox"/> refused by pt.	Fire department on scene <input type="checkbox"/> no <input type="checkbox"/> yes	
<input type="checkbox"/> release to BLS	<input type="checkbox"/> MD release	<input type="checkbox"/> n/a	EMT on scene <input type="checkbox"/> no <input type="checkbox"/> yes (identify) _____	

INCIDENT LOCATION Please indicate location of incident and location of treatment.

House: Parquet Dress Circle Balcony Gallery Box # _____
 Lobby: Main/Elevator Street/Ticket Stair level# _____ North level # _____ South level # _____
 Backstage: Dressing Room North Stairs South Stairs 33 Onstage Box # _____
Other Location: _____

<p>If in House: House Light Level: [] Full [] ½ [] Glow [] Out If on Stage: [] Work Lights [] Stage Lights [] Blackout General Light Level VERY DARK DIM NORMAL VERY BRIGHT ----- ----- ----- ----- Floor Type: [] Rug [] Tile [] Wood [] House Step(s) [] Ramp or Incline [] Lobby Step(s) Ticket/Sale Info if applicable: Sale# _____ Section _____ Row _____ Seat _____</p>



General Notes: _____

As this is a theater there may be times when areas of the building may be dark and flooring or steps may be irregular. The above is to determine the conditions of a given location at the time of the incident only. It is assumed anyone moving around in the darkness or on irregular flooring assumes any risk there of. The Music Hall strives to keep all areas as safe as possible within the confines of the building architecture.

FUNDRAISING

According to surveys conducted by both the League of Historic American Theatres and Theatre Communications Group, US theaters generate roughly 50-70 percent of their revenue from earned income, with the balance of their revenue coming from fundraising.

Like board and committee development/management, the topic of fundraising could easily fill an entire manual – and, as is the case with board and committee development/management, hundreds of books and manuals have been written about fundraising for nonprofit organizations.

Some general suggestions and best practices:

- Raise money from both those people who are interested in ensuring that the building is preserved and also from those who are interested in supporting the programming the theater offers. For those interested in ensuring that the building is preserved and remains a vital part of the community, consider creating a “Friends of the Theater” group to raise money for the building’s ongoing maintenance and periodic rehabilitation.
- Consider creating endowed funds to support the theater’s operations and its programming (see *OPERATING ENDOWMENTS and PROGRAMMING ENDOWMENTS*).
- Require that all board members make an annual contribution to the theater. Even if a board member cannot afford to make a large contribution, it is important for the theater’s overall fundraising that 100 percent of the board makes an annual gift.
- Provide periodic fundraising training for board members, fundraising volunteers and staff. It need not involve bringing in an outside trainer; there are a number of nonprofit organizations that provide online workshops and videos, such as the Foundation Center (<http://foundationcenter.org/getstarted/training/online/>) and Network for Good (<http://www.fundraising123.org/training>). David Brown, the National Trust for Historic Preservation’s executive vice president and a highly skilled and experienced fundraiser, recommends that board members, volunteers and staff who are involved in fundraising read *Asking: A 59-Minute Guide to Everything Board Members, Volunteers, and Staff Must Know to Secure the Gift*, by Jerold Panas (Emerson & Church Publishers). As the title suggests, it is a small book – but packed with helpful guidance about raising money for nonprofit organizations.
- In addition to sponsorships, memberships, annual giving, and endowments, try to add a new, fun fundraising event every year or two. For example, the Colonial Theatre (Phoenixville, Pennsylvania) sponsors an annual whisky tasting in conjunction with Scottish poet Robert Burns’s birthday. Proceeds from the event – which sells out every year – help support the theater’s Classic Film Series. And Lurene Frantz, the longtime director of the Central

Pennsylvania Festival of the Arts, raised thousands of dollars each year by auctioning off the “privilege” of serving on the festival’s trash crew, effectively making this a coveted, high-profile volunteer job within the community.

- Be sure the public is aware that the theater is a nonprofit organization and that tickets cover only a portion of the costs of operating the theater. The executive director or a board member of the Rylander Theatre in Americus, Georgia, gives a brief welcome to the audience before every performance, mentioning the fact that the theater relies on the community’s financial support.
- Find creative and fun ways to thank supporters. Each year, the Colonial Theatre holds an annual members’ party in conjunction with the Academy Awards, which it screens there. The theater serves cocktails in the lobby before the Awards begin but, because the members’ party has become so popular, and the theater’s lobby can only comfortably hold 150 people, that the theater now divides guests into two groups, with half arriving at 7:00pm and the remainder at 8:15pm.

As for the balance of their revenues, theaters report in LHAT’s and TCG’s annual surveys that individual ticket sales account for the largest percentage of their earned income, followed by subscription sales, theater rentals, and concessions. But some theaters are finding new ways to generate earned income. Some examples:

- The Herbing Theatre Center (Phoenix, Arizona) offers Lunch Time Theatre on Tuesdays, Wednesdays, and Thursdays at 12:10pm. The series usually consists of 30-minute one-act plays, but it has also included short films and fashion shows featuring clothing from downtown shops. Tickets are \$6. People can bring their own lunches or order a lunch from the theater’s caterer for \$6-8.
- Spencer Community Theatre earns roughly 35 percent of its income from costume rentals.
- Silent auctions have earned significant income for several historic downtown theaters, including the Lebanon Opera House (Lebanon, New Hampshire), Stuart’s Opera House (Athens, Ohio), and the Boothbay Harbor Opera House (Boothbay, Maine). The Boothbay auction is held in conjunction with the annual Friends of the Opera House’s “Dough Ball”, a ticketed dinner and dance.
- More than 50 theaters across the country have raised money for digital equipment upgrades through crowdfunding websites like Kickstarter.com. but some have used crowd funding to raise money for new productions, new stage lighting systems, and marquee restoration, among other projects.
- The DeSoto Theatre, in downtown Rome, Georgia, rents its auditorium to the Seven Hills Fellowship Church, which holds its Sunday morning services there. The church not only rents

space but has also helped cover the costs of installing a movie screen and renovating the theater lobby.

- The Music Hall, in Portsmouth, New Hampshire and the Mabel Tainter Memorial Theatre in Menomonie, Wisconsin each charge a \$2/ticket “MOP” fee (Maintenance, Operation, and Preservation). The Orpheum, in Sioux City, charges \$2/ticket for tickets over \$20 and \$1/ticket for tickets under \$20, with proceeds used for theater operation. In a 2006 survey by the League of Historic American Theatres, over 50 other theaters reported using ticket surcharges to raise money for operating expenses.

I N S U R A N C E

Theaters generally purchase two types of insurance coverage:

- **Directors and officers liability insurance:** Directors and officers liability insurance – D&O – protects board members from individual liability in the event of an accident or adverse legal judgment involving the theater.
- **Property insurance:** Property insurance protects the value of the theater in the event of an accident. There are two particular points on which to be particularly diligent, though:
 - While virtually all historic theaters in the US have property insurance that provides replacement costs, relatively few have coverage that would reimburse an insured theater for the full replacement value of rare and distinctive architectural features, in the event any of these features were damaged or destroyed. “Replacement cost” is generally interpreted to mean replacement with “like and kind quality”, which is usually interpreted to mean a similar style and similar materials, but not with faithful replicas, and not taking depreciation into consideration. It is important to have historic replacement cost coverage.
 - Many theaters’ insurance policies include a co-insurance clause, requiring the theater to maintain a minimum limit of property insurance, based on a percentage of the building’s actual replacement cost. If a theater’s actual replacement cost would be \$1 million and it has a property insurance policy with an 80 percent co-insurance clause, it would need to have at least \$800,000 in coverage in order to avoid being penalized if it needed to file a claim. For example, if it were insured for just \$500,000, the theater’s claim would be reduced by 30 percent, providing just a \$350,000 settlement. It is therefore crucial to base a historic theater’s coverage on an accurate appraisal of its full replacement value.

There are other types of insurance that historic theaters should consider, as well, such as insurance for artifacts (such as musical instruments) and collections, liability coverage for volunteers, and, if the theater’s rehabilitation will use historic rehabilitation tax credits, insurance for the tax credit investment.

Theaters should require insurance coverage from the people, businesses, and organizations that use or work in their facilities:

- **Coverage for theater renters:** Many theaters require those who rent their facilities to provide evidence of a certain level of insurance coverage and to provide them with a certificate naming the theater as a co-insured entity for the duration of the rental.

An example from the Virginia Theatre:

Each presenter is required to fully insure itself, its officers, directors, employees, agents, and presentations at its own expense for Worker's Compensation and Employer's Liability (including disability benefits); Comprehensive general liability (personal injury, including bodily injury, \$1 million per occurrence); Theft and Fire insurance (with applicable extended coverage clause) for all properties brought into the Virginia Theatre, including without implied limitation, the property of third persons under the control of the presenter. You will be required to provide a certificate of insurance with the Champaign Park District named as an additional insured if this event is approved.

- **Coverage for contractors:** Require insurance coverage by contractors working in the facility. This helps protect the theater in the event of damage or loss caused by a contractor.

MARQUEE RENTALS

Some theaters reserve their marquees only for their own events. Some make them available, either free or for a fee, to businesses and organizations that rent their facilities. Others rent their marquees to the public for certain purposes and for specified periods of time.

Examples:

- The Edmonds Theatre (Edmonds, Washington) rents its marquee for \$10 (short messages) or \$20 (long messages).
- The Ritz Theatre (Newburgh, New York) rents its marquee for \$100.
- The Embassy Theatre (Fort Wayne, Indiana) only makes its marquee available to businesses and organizations that rent the theater.
- Like most state departments of transportation, the Kansas Department of Transportation collects information on the numbers of vehicles that pass through busy intersections on a daily basis. The Orpheum Theatre, in downtown Wichita, uses this information to attract advertisers for its marquee, promoting the fact that 18,000 cars pass through the intersection of Broadway and 1st Avenue every day. The Orpheum offers two marquee rental options: a 30-minute message for \$100, or a three-second rotation, repeated throughout a 24-hour period, for \$500.
- The Old Town Theatre, in Huntsville, Alabama, makes its marquee rental application available online (<http://www.oldtowntheatre-huntsville.org/marquee-rental-application.html>).

Some theaters use the proceeds generated by marquee rental to create a reserve fund for the marquee's eventual rehabilitation.

MISSION STATEMENTS

A theater's mission statement should explain, as succinctly as possible, its purpose and reason for existing. The mission of a historic theater almost always has two components: to preserve the building for the future, and to offer programming that meets community needs.

A good mission statement helps an organization maintain a tight focus on its role and direction. It is invaluable in marketing, and it is almost indispensable in an effective fundraising program.

The mission statement should be clear about three things:

1. The market the theater serves
2. The service(s) it provides, and
3. The key characteristics that make it unique.

Each of these things changes over time. A community's population might become younger or older, or its interests might shift. The types of programming in which the community is interested might change, and new market opportunities might develop. The characteristics that people value might shift. For this reason, a theater organization's mission statement should change over time, also. For example, when an organization begins the process of rehabilitating a historic theater, its mission is tightly focused on preserving the building – and its mission statement should reflect this. But when the building has been stabilized, rehabilitated, and returned to service as a performing arts and/or public assembly facility, its mission statement should shift to one that articulates and emphasizes the role the facility plays in the community.

In *A New Framework for Building Participation in the Arts*, authors Kimberly Jinnett and Kevin McCarthy point out that the programming a theater chooses reflect its core priorities. So, for example, theaters that use performing arts in order to improve the community are essentially making the community their core focus. Those that use performing arts in order to increase appreciation for performing arts are essentially making performing arts their top priority. Those that emphasize the creation of new works of art are essentially making creativity and artistic expression their top priority. Jinnett and McCarthy use the shorthand “*canon-focused, community-focused, and creativity-focused*” to describe these three core mission elements.

Here are some examples of mission statements from historic downtown theaters throughout the country:

Smyrna Opera House (Smyrna, Delaware)

Operated by the non-profit Smyrna-Clayton Heritage Association, the Smyrna Opera House is dedicated to showcasing and developing local creative, visual and performing artists while also offering affordable access to the arts and varied cultural and artistic experiences to people of all ages and backgrounds.

Fox Theatre (Hutchinson, Kansas)

Hutchinson's Historic Fox Theatre is a regional center for the arts dedicated to the expression of the human spirit through quality entertainment and educational programming.

Abbeville Opera House (Abbeville, Louisiana)

The Abbeville Opera House is a not for profit organization with the mission to create, present, improve and enhance quality theater. It is our goal to create opportunities for community participation in enriching theatrical experiences, thereby attracting theater patrons and tourists to our historic community. Our focus is on inclusion and quality. We try to provide a well-balanced and artistic theatrical season. And we strive to meet with excellence all of the demands placed on our turn-of-the-century theater.

Waterville Opera House (Waterville, Maine)

The mission of the Waterville Opera House Improvement Association is two-fold: to maintain and improve the historic Waterville Opera House as a cherished public treasure and a vibrant modern theater; and to provide the community with a rich variety of cultural activities including live theater, music, and dance performances, arts education, and celebration of our community.

Corbin Theatre (Liberty, Missouri)

The Corbin Theatre Company in historic Liberty is committed to providing high-quality theatrical entertainment, encouraging and facilitating community participation in every phase of live theater, offering high-quality musical entertainment through shows from various music genres, and sponsoring and promoting educational opportunities that create greater knowledge of the performing arts.

Grand 1894 Opera House (Galveston, Texas)

The mission of The Grand 1894 Opera House is to enrich the cultural life of Galveston and the Gulf Coast Region. The Grand fulfills its mission through the following goals:

- Restore, improve, and manage the historic Grand 1894 Opera House complex (which includes the theater and the attached apartment building) as a leading performance venue, meeting current and evolving needs of performing artists and audiences.
- Present high-quality touring artists in theater, music, dance, opera, children's programming and other performance genres that engage and enrich the lives of diverse communities.
- Pursue partnerships and collaborations that assist in bolstering the Galveston economy.
- Foster best business practices as befits "The Official Opera House of the State of Texas."

Draper Historic Theatre (Draper, Utah)

Draper Historic Theatre, a non-profit organization, enriches families, individuals and the community by providing positive artistic experiences in theater - including affordable, wholesome entertainment and pleasant, edifying performance and educational opportunities.

Barter Theatre (Abingdon, Virginia)

Barter is a resident company of passionate professional artists and leaders dedicated to serving and enriching our region by creating live theater in repertory; by providing a nurturing environment for all involved; by embracing and celebrating Appalachia; by being stewards of the legacy of Barter Theatre; by using theater as a vehicle for education; and by providing audiences, both youth and adult, with an extraordinary and enlightening experience each and every time they engage with us.

Paramount Theater (Charlottesville, Virginia)

The mission of The Paramount Theater of Charlottesville, Inc., is to operate the newly-restored and adapted historic Paramount Theater, located in downtown Charlottesville, Virginia, for the artistic, educational, and charitable benefit of its community, including the city of Charlottesville, Albemarle and surrounding counties, and the entire Central Virginia region.

Johnson Hall (Gardiner, Maine)

To enrich people's lives in the Southern Kennebec Valley and beyond by offering creative, educational, and performing arts programs, preserving an historic building, providing a community gathering place, and serving as a catalyst for cultural and economic growth.

NONDISCRIMINATION POLICIES

It is considered a good practice for theater boards of directors to adopt a nondiscrimination policy for the theater.

An example from the Passage Theatre (Trenton, New Jersey):

Passage Theatre is an equal opportunity employer who does not discriminate against any individual regardless of sex, race, religion, sexual orientation or disability. Programs and services provided by Passage Theater will be made available to all individuals regardless of disability and all efforts will be made to ensure that all individuals can experience all programs and services of the theater with dignity and independence.

Some theaters include a requirement in their rental policies that rental applicants agree not to discriminate.

An example from the Empress Theatre (Vallejo, California):

Applicant will not discriminate against, segregate, refuse admittance to nor provide biased or even preferential treatment on the basis of race, color, creed, religion, sex, age, handicap, medical condition, sexual preference, gender identity, marital status, ancestry or national origin of any person. This includes in programming and program content or philosophy and specifically prohibits programming promoting or advocating discrimination, violence or biased treatment based on any of these classifications.

OPERATING ENDOWMENTS

Several historic theaters have created operating endowments to provide ongoing financial support for theater maintenance and/or operations.

A few examples:

- The Holly Endowment Fund was established to support the operation of the Holly Theatre in downtown Dahlonega, Georgia. The Fund is managed by an Endowment Fund Board, separate from the theater's board of directors. The Endowment Fund Board oversees the endowment's investment portfolio, seeking to maximize its financial returns without undue risk, and makes an annual distribution each February to the theater from interest earned on its investments.
- The Cascade Theatre Endowment Fund, which benefits the Cascade Theatre in Redding, California, was established with an initial grant from a local family and has grown with additional contributions from the community. The Fund is managed by the Shasta Regional Community Foundation.
- The Spencer Theatre for the Performing Arts – in Alto, New Mexico (not Spencer, Iowa) – launched its “TWENTY for TWENTY” endowment campaign in 2007, seeking to raise \$20 million by the theater's 20th anniversary in 2017. The endowment fund will be used to cover operating deficits, provide reserves for emergencies, and support new initiatives.
- While Lexington, Kentucky's Opera House Fund, Inc. was originally established to help raise money for the rehabilitation of the historic Lexington Opera House, it now focuses on raising money to help pay for two of the theater's series (Broadway Live and Variety Live) and to subsidize use of the theater for local nonprofit organizations that are members of LexArts, a regional nonprofit arts organization in Central Kentucky.

Best practices:

1. Create an operating endowment!
2. Establish separate governance for the endowment fund and the theater.
3. Build the endowment's corpus through wise investment, spending only the interest earned.
4. Develop a written investment policy statement so that donors, investment professionals, auditors and others are aware of the fund's purpose, investment objectives and investment direction.

An example from the Hale Centre Theatre:

Hale Centre Theatre Endowment Fund Investment Policy Statement

PURPOSE

The Hale Centre Theatre Endowment Fund (EF) is created to: (1) be a reserve fund to supplement shortfalls in theater operating funds; (2) eventually grow to have sufficient corpus to generate enough growth and income to offset all revenue needs beyond ticket sales on an annual basis to meet operating budgets expenses.

OVERVIEW

This statement is intended to explain the investment policies of EF an outline the key responsibilities and duties related to these policies. The timeframe for EF is long-term with the expectation that it will continue in perpetuity.

OBJECTIVE

The primary objective is to provide an optimal total return within the constraints described herein. The assets must be invested with the care, skill and diligence that a prudent person acting in this capacity would undertake. Whereas it is understood that fluctuating rates of return are characteristic of the securities markets, the managers greatest concern should be long-term capital appreciation of the assets and consistency of total portfolio returns. The returns should be commensurate with the selected benchmarks for the various asset classes without taking undue risks.

INVESTMENT GUIDELINES

Asset Allocation: the long-term targeted asset allocation is 50% equity/50% fixed income with up to 5% in cash instruments. The maximum allocation for either asset class is 65%, and the minimum is 35%. Because security market conditions can vary greatly through a market cycle, the manager is granted full discretion to change the asset mix, within the above ranges, for the purpose of increasing investment return and/or reducing risk. The cash percentage may be increased for short-term needs of Hale Centre Theatre.

The manager may utilize individual securities, commingled/mutual funds or exchange traded funds (ETFs) for investing. Gifted securities will be sold as soon as received into the portfolio with the proceeds reinvested immediately unless the manager determines that the security fits the overall strategy of the portfolio.

The Finance Committee (FC) may counsel and advise the manager to allow any deviations from the guidelines established within this policy.

EF EQUITY SEGMENT

Equity market performance will be measured against the Standard and Poors 500 Index (S&P 500).

Not more than 5% of the assets of the fund (at market value) may be invested in any one security. ETFs would be considered diversified.

Small capitalization equities may represent up to 10% of the equity position. International equities may also represent up to 10% of the equity position. The remainder of the equity position should be made up of large capitalization equities the trade on a major US stock exchange or in the over-the-counter market (May include ADRs). The equity component should include both growth and value equities.

FIXED INCOME

Fixed income market performance will be measured against the Lehman Brothers Intermediate Government/Credit Index (LBIGC).

With the exception of US Government obligations and government agencies, not more than 5% of the assets of the fund (at market value) may be invested in the securities of any one issuer. ETFs would be considered diversified.

The manager will restrict purchases of fixed income securities for the account to investments rated “BAA-” or better by Standard & Poors (or the equivalent Moody’s rating). The average rating of all fixed income securities should be A+ or higher. A bond whose rating falls below investment grade should be immediately sold.

The average duration should be within 20% of the designated benchmark.

LIQUIDITY

It is expected that a percentage of the portfolio will be withdrawn annually. Portfolio assets shall be selected which have well-developed, liquid markets. The cash portion of the portfolio shall be invested in money market funds or other short-term money market instruments at the discretion of the manager.

RESTRICTIONS

The investment manager will not engage in transactions involving commodities, restricted stock, private placements, warrants, securities purchased on margin, shortselling, real estate, venture capital or precious metals.

REPORTING REQUIREMENTS

The FC overseeing EF expects from the manager verbal communication as frequently as they deem necessary. The FC also understands that the investment manager will provide monthly statements and quarterly performance reports. The investment manager will be expected to meet annually with the FC discuss performance and strategies.

Hale Centre Theatre

Date

Investment Manager

Date

P L A N N I N G

Good long-range planning is of course essential to theater administration. There are several types of plans that are particularly crucial:

1. Strategic plans help theaters clarify their missions, conceptualize the strategies needed to achieve their missions and identify their top long-range priorities. A good strategic plan helps the board and staff maintain a tight focus on the theater's mission and ensure that all its activities reinforce this mission and advance the theater's goals.
2. Business plans outline the specific products and services the theater will offer, provide detail on the market potential for the theater's activities, describe the competitive environment, provide information on the theater's organizational and financial capacity and identify the theater's financial goals and the tactics it will use for meeting its financial goals. A good business plan can help a theater expand audiences, develop new programming and increase financial support.
3. Marketing plans explain how the theater will reach customers, contributors, partners and the public at large. They generally include consideration of marketing the theater itself (e.g., creating a positive public perception of the theater and its importance to the community) as well as marketing the activities and events that take place there.

These three plans overlap in some ways. Some theaters include their business plans in their strategic plans; some combine their business plans and marketing plans; some combine all three. What is most important is that the theater's board and staff set aside time for long-range planning every few years, reevaluating their activities and opportunities periodically and revising plans accordingly.

STRATEGIC PLANS

Strategic planning usually begins by defining, or redefining, the theater's mission statement. A mission statement explains, in (hopefully) compelling and concise terms, what the theater seeks to achieve and how it plans to achieve it (see *MISSION STATEMENTS*). From there, the structure of strategic plans vary considerably - but, in general, most good strategic plans contain the following components in one form or another:

- **Values:** A list or description of the theater organization's core values – the guiding principles that form the foundation of its work.
- **SWOT analysis:** A thoughtful analysis of the theater's current strengths, weaknesses, opportunities, and threats (threats could mean threats to its market, image, funding, physical condition etc.).

- **Long-term strategies:** The several major areas of strategic focus the organization intends to pursue in order to fulfill its mission.
- **Short-term priorities:** Depending on whether the board intends to create a freestanding business plan or incorporate elements of a business plan into its strategic plan, the strategic plan might include a section that details the organization’s short-term priorities - the specific actions it tends to take in pursuing its long-term strategies.
- **Benchmarks:** The strategic plan should list and explain the measurements it will use in order to track its progress and evaluate whether it is meeting its goals.

A few examples:

- The Janesville Performing Arts Center (Janesville, Wisconsin) created a five-year strategic plan in 2013 that identified five specific challenges that the theater must address: unused capacity, financial and organizational strength of the theater’s user groups, branding (“Most people do not differentiate between user groups but view them as performances at JPAC. A poor show can have an impact on others just as a well-reviewed show can set high expectations for others.”), providing superior services in a lean organization and providing for unexpected costs in maintaining facility.

<http://www.janesvillepac.org/jpac/community/2013-2017-strategic-plan/>

- The Colonial Theatre (Bethlehem, New Hampshire) summarized its strategic plan in just five pages.
- What began as an idea for a plan to retire its debt turned into a strategic plan for the Flynn Theatre for the Performing Arts (Burlington, Vermont). As the theater’s board of directors began to plan for a small capital campaign, it quickly realized that it actually needed to look farther in the future and take a deeper look at its mission. It had concluded a major capital campaign for the building’s rehabilitation just a few years earlier, and board members realized that, now that the theater was no longer in its “rehabilitation” phase but was now an operating theater, the community (and, to an extent, the board itself) was unclear about the theater’s new role. The resulting strategic plan ultimately helped the theater not only retire its debt but also create a small endowment fund and the cash reserve. And, the strategic plan was instrumental in helping the theater attract two major \$1 million+ grants from the Doris Duke Charitable Foundation and the Ford Foundation to expand its programming.
- The Capitol Fringe’s 2015 strategic plan (Washington, DC) includes a one-page “Strategic Plan at a Glance”, providing a quick summary of the arts festival’s position/performance in January 2013 and, for each summary point, a description of where it hopes to be in December 2015.

An excerpt:

Where we are and where this plan will take us ...

JANUARY 2013	DECEMBER 2015
Professional producing organization with an annual budget of just close to \$1 million, whose primary programs consist of the annual Fringe Festival, fallFRINGE and the Training Factory	A year-round dynamic producing organization whose programming includes the annual summer Fringe Festival with an annual attendance of over 40,000, year-round programming, educational and training programs for artists and youth
Performing in a rented space, Fort Fringe, significant operational and technical challenges	Operating in a newly-constructed/rehab multi-venue performance and office space in the District, the Fringe Theater Barn, allowing us to grow our capacity, increase revenue and better serve the audiences and artists of our community

<https://capitalfringe.s3.amazonaws.com/documents/2/file.pdf?1366415238>

Resources

Michael Kaiser, a former executive director of The Kennedy Center, has written several excellent books about various aspects of theater management, including two that deal in whole or in part with strategic planning:

- *The Art of the Turnaround* (2008)
- *Strategic Planning in the Arts: A Practical Guide* (1995)

BUSINESS PLANS

Business plans usually consist of several core components:

- **An executive summary:** The executive summary provides a concise summary of the plan’s major findings, the theater’s primary products/services, its financial goals and the major strategies and activities the theater will pursue to meet these goals.
- **A brief overview of the theater’s background and history:** The overview helps orient people who might not be very familiar with the theater, providing a brief description of the theater’s history and how it came to be owned and managed by its current team.
- **Management team:** This section lists the theater’s board of directors and key staff and provides a description of their duties and credentials.

- **Snapshot of current goals, organizational structure and financial performance:** This section provides an overview of how the theater currently operates. It should include information on the theater’s management team, organizational structure, and financial performance, with supporting documentation such as balance sheets and cash flow statements.
- **Market analysis:** The market analysis should include a list and brief analysis of the theater’s “competition”, including other theaters and assembly spaces in the area and other activities that compete for residents’ and visitors’ leisure time.
- **Major objectives:** This section includes a summary of the theater’s short- and long-term goals.
- **Strategies:** This section outlines the strategies the theater intends to pursue in order to
- **Attachments:** To the extent possible, the business plan should be compelling to read. For that reason, it is usually best to attach spreadsheets, lists, resumes, samples of marketing materials, and other detailed data as an appendix to the business plan, referencing it and excerpting it, as appropriate, in the body of the plan. Attachments might include profit/loss statements, balance sheets, cash flow statements, return on investment statements, market analyses, resumes, survey data and marketing materials.

Some online examples:

- The board of directors of the Criterion Theatre and Arts Center (Bar Harbor, Maine) developed a business and restructuring plan in 2011, realizing that the theater’s revenue was declining and its mission was fuzzy. The plan’s executive summary succinctly summarizes the challenges facing the organization: “economic feasibility, repayment of debts, programming relevance, community involvement, donor cultivation and long-term stability”. The business planning process helped the theater realize that it would need to significantly restructure its programming, cutting back on first-run movies and shifting more emphasis to classic and independent films, live performances and theater rentals. The theater is currently closed while the board raises money for the theater’s renovation and relaunch.

http://doczine.com/bigdata/2/1367022059_2ff2576912/criterion_bp_final_2-28-11.pdf

- Sometimes the business planning process uncovers unpleasant information. The Theater at Lime Kiln (Lexington, Virginia) incorporated a business plan into its “Financial Support Proposal” floated to the city and county governments and to area philanthropists to convert the historic outdoor theater “from a problem child to a cash cow.” The business plan was instrumental in helping the theater’s board of directors realize that the theater could not survive if it drew customers from Lexington and Rockbridge County alone; it would need to

attract customers from a much larger market area. As a result, the board decided to close the theater.

<http://blogs.roanoke.com/arts/files/2012/08/2013-Business-Plan-1-1.pdf>

MARKETING PLANS

Marketing plans typically help answer several key questions:

- **Who are we currently reaching?**
 - Who currently buys tickets?
 - What potential audiences are we missing, and how do they currently perceive us?
 - If our customers and potential customers aren't here, where are they – and who or what are we competing against for their interest and involvement?
 - Which of our current marketing activities work well, and which ones don't work so well and why?
 - Are there any trends or new developments that might affect us in the near future?

- **Who do we want to reach?**
 - Who are we trying to reach?
 - What sort of marketing activities are most effective in reaching these people?

- **How will we get there?**
 - How will we winnow down all the options and choose ideas and actions that are likely to best reinforce our best meet our evolving mission, our skills, and our resources?
 - What specific steps do we need to take to meet – and hopefully exceed – our marketing goals?

- **What's the game plan?**
 - Who will be responsible for which actions?
 - How much will this cost, and how will we pay for it?

- **What are the benchmarks?**
 - How will we know which marketing strategies have been most effective?

Some examples:

- The Rylander Theater's most recent marketing plan began with surveys of current audience members and an analysis of the potential audiences within the Americus, Georgia area. The marketing plan identified five clear customer segments to target:
 - Current patrons
 - New senior citizen patrons

- Tourists and Rylander visitors
- New young adult patrons
- New young family patrons

The marketing plan outlines a number of specific actions for each of these customer segments, from sending flash mobs to two nearby colleges to promote performances at the Rylander to providing buses to bring residents of area assisted living facilities to the Rylander.

<http://archwaypartnership.uga.edu/wp-content/uploads/2012/05/Rylander-ALL-v4.pdf>

- The marketing plan that the board of directors of the Midland Theatre (Newark, Ohio) developed established several clear marketing goals:
 - Increasing attendance by 18-35 year old patrons by 50 percent over the next two years
 - Offering more programming for families with children
 - Increasing programming that appeals to younger audiences
 - Making greater use of social media (like Facebook and Twitter)
 - Keeping prices reasonable
 - Update the theater's website so that it is more youthful, energetic, and streamlined
 - Attract people who have never visited the theater before

http://www.opresume.com/projectfile.ashx?uid=1509&pid=3372&sid=1632&name=Marketing_Plan.docx

PROGRAMMING ENDOWMENTS

A few historic theaters have created endowments to support certain types of programming. Income from these endowments helps supplement revenue from ticket sales and show sponsorships and can be invaluable in helping a theater experiment with new types of programming or develop a specialized programming niche.

Some examples:

- The Lobero Theatre (Santa Barbara, California) has created four programming endowment funds: one for dance, one for American roots music, one for theater and one for classical music.
- A generous family in Kansas City, Missouri created a performance endowment fund for the Starlight Theatre, one of the theater's four endowed funds (the other three support a scholarship, educational programs and the facility).
- The Mount Baker Theatre (Bellingham, Washington) launched its programming endowment with a \$1 million gift from a local family. Over time, it hopes to increase the fund's principal to \$5 million, the interest from which will cover about 15% of the theater's operating expenses. The endowment fund is used for three purposes: (1) to bring a broader range of performances to the theater, (2) to develop original new programming and (3) to provide reduced price daytime education performances for area students.
- The Chemainus Theatre Foundation (Chemainus, British Columbia) was created in 2005 to support programming at the Chemainus Theatre. The fund is managed by the Vancouver Foundation. The theater was able to secure a matching grant commitment from the Department of Canadian Heritage (the Canadian equivalent of the National Endowment for the Arts, more or less) for all donations made before November 30, 2013. In 2012, the fund earned roughly \$35,000 in interest, all of which was used to support the theater's programming.

RECORDS RETENTION SCHEDULE

It is good practice for the board of directors to develop and adopt a records retention policy such as this one, from the BoardSource website:

RECORD	RETENTION TIME
Accident reports and claims (settled cases)	7 years
Accounts payable ledgers and schedules	7 years
Accounts receivable ledgers and schedules	7 years
Audit reports of accountants	Permanently
Bank reconciliations	1 year
Capital stock and bond records, ledgers, transfer registers, stubs showing issues, record of interest coupons, options, etc.	Permanently
Cash books	Permanently
Chart of accounts	Permanently
Checks (cancelled, but see exception below)	7 years
Checks (cancelled for important payments such as taxes, purchase of property, special contracts, etc.). Retained checks should be filed with the papers pertaining to the underlying transaction	Permanently
Contracts and leases (expired)	7 years
Contracts and leases still in effect	Permanently
Correspondence (routine) with customers or vendors	1 year
Correspondence (general)	3 years
Correspondence (legal and important matters only)	Permanently
Deeds, mortgages, and bills of sale	Permanently
Duplicate deposit slips	1 year
Employee personnel records (after termination)	3 years
Employment applications	3 years
Expense analyses and expense distribution schedules	7 years
Financial statements (end-of-year; other months optional)	Permanently
General and private ledgers and end-of-year trial balances	Permanently
Insurance policies (expired)	3 years
Insurance records, current accident reports, claims policies, etc.	Permanently
Internal audit reports	3 years (min.)
Internal reports (miscellaneous)	3 years
Inventories of products, materials, and supplies	7 years
Invoices to customers	7 years
Invoices from vendors	7 years
Journals	Permanently
Minute books of directors, including by-laws and charter	Permanently
Notes receivable ledgers and schedules	7 years

Option records (expired)	7 years
Payroll records and summaries, including payments to pensioners	7 years
Petty cash vouchers	3 years
Physical inventory tags	3 years
Plant cost ledgers	7 years
Property appraisals by outside appraisers	Permanently
Property records, including costs, depreciation reserve, end-of-year trial balances, depreciation schedules, blueprints, and plans	Permanently
Purchase orders	7 years
Receiving sheets	1 year
Requisitions	1 year
Sales records	7 years
Scrap and salvage records (inventories, sales, etc.)	7 years
Stock and bond certificates (cancelled)	7 years
Stockroom withdrawal forms	1 year
Subsidiary ledgers	7 years
Tax returns and worksheets; revenue agents' reports and other documents relating to determination of income tax liability	Permanently
Time books	7 years
Trade mark registrations	Permanently
Voucher register and schedules	7 years
Vouchers for payments to vendors, employees, etc. (includes allowances and reimbursement of employees, officers, etc. for travel and entertainment expenses)	7 years

RENTAL APPLICATIONS + AGREEMENTS

Rental applications

Some suggestions:

- Don't confuse a rental *application* with a rental *agreement*. Some theaters combine them into one document – but doing so can inadvertently imply that the rental will be automatically approved.
- Include an instruction sheet with the rental application. The instruction sheet should provide information about fees, permitted and prohibited activities and uses, insurance requirements, and the application process.
- Be sure the application is clear about *all* the fees for renting the theater, using the theater's equipment or technical staff, and any other costs.
- Require that renters are insured and that they provide you with a certificate

The Colonial Theatre, in Phoenixville, Pennsylvania, provides an entire set of rental documents online, including a blank contract, in a single download, so that applicants can review the contract before submitting an application.

A few examples:

- Plaza Theatre (Glasgow, Kentucky)
http://www.plaza.org/Rental_Contract_Apr-27-2012.pdf
- Colonial Theatre (Phoenixville, Pennsylvania)
http://thecolonialtheater.com/col_wp/images/Colonial_COMPLETE_Rental_Application.pdf
- KiMo Theatre (Albuquerque, New Mexico)
http://www.cabq.gov/culturalservices/kimo/documents/kimo_rental_application_708.pdf

Rental agreements

Most theaters include these basic components in their rental agreements:

- The timing of all set-up and event activities, including the times that the decorators, food caterers, musicians and guests will arrive
- The time by which clean-up must be completed
- Table and seating set-up details
- Number of guests anticipated
- Technical requirements (lighting, sound, etc.)

- Specific requirements for using the space, including table/chair setup, decorations, use of dressing rooms and other ancillary spaces, catering and clean-up

The Grand Theater, in Frankfort, Kentucky, has a 36 page rental application and contract⁸.

Best practices:

- Require that renters provide your theater with a certificate of insurance, naming you as an “additional insured”, ensuring a certain amount of coverage (\$300,000 in general liability coverage seems to be typical). Some examples of insurance requirement clauses:
 - **Insurance Requirements** (Village Theatre – Danville, California)
The Town of Danville requires permit users to provide a “Certificate of Liability Insurance” naming the Town of Danville as an additional insured. Certificate must include the Town’s address, which is 510 La Gonda Way, Danville, CA 94526. You may purchase liability insurance coverage through the Town of Danville for an additional cost, or you may provide it through your homeowners insurance carrier. Insurance coverage must be submitted 90 days prior to your scheduled event.
 - **Insurance Requirements** (Colonial Theatre – Phoenixville, Pennsylvania)
Single limit insurance coverage in the amount of \$2 million combined personal liability and property damage for the above rental date(s) is required of Renter.
 - a) Renter must provide ACT with a certificate of insurance listing “The Association for the Colonial Theatre” as the certificate holder.
 - b) “Certificate holder is recognized as an additional insured per the terms of their contract” must be included in the Description of Operations section of the certificate.
 - c) ACT must receive the certificate of insurance at least 15 days in advance of the rental date. If the certificate is not received at least 15 days in advance of the rental date, the contract will automatically terminate.
- Explicitly state in the rental agreement that renters are responsible for any and all damages to the building.
- Some theaters require a damage deposit from which the cost of repairing minimal damages can be deducted. Assuming that no damage occurs, the theater returns the damage deposit to the renter within several days of the rental.
- Some theaters include a non-discrimination statement in their rental agreements. This is particularly important if the event for which the theater is being rented is open to the public.

⁸ <http://www.grandtheatfrankfort.org/Portals/87/Forms/Grand%20Theater%20Frankfort%20-%20Rental%20Contract.pdf>

An example, from the Elbert Theatre (Elberton, Georgia)

Patrons with Disability and Nondiscrimination Statement

I understand that, pursuant to the Americans with Disabilities Act, the City of Elberton will make reasonable efforts to accommodate persons with disabilities. I understand that the Elbert Theatre has limited wheelchair capacity. If I become aware that someone in my group or audience requires special accommodation, I will notify the City of Elberton employee on duty immediately.

I understand that, if my event is open to the public, I may not prohibit any audience member because of race, religion, creed, gender, sexual orientation, age, national origin or any other basis to the extent prohibited by federal, state or local laws.

VOLUNTEERS

Some recommended best practices:

- Develop job descriptions for each volunteer position so that volunteers understand what skills they need for a particular position and what the position will involve.
- Develop a volunteer handbook. Include not just information on procedures but also on the theater's history and its policies.
- Be sure all volunteers are aware of the theater's emergency procedures. Periodically rehearse evacuating the theater.
- Provide orientation and training for each volunteer for his/her position.
- Ask volunteers to sign a contract or letter of commitment. This helps reinforce the importance of the commitment they are making.
- Front-of-house volunteers are the people with whom patrons will have most frequent contact – and, as such, they can be the theater's most important ambassadors. Be sure these volunteers, in particular, are familiar with the theater's programming, its fundraising needs and its donor opportunities.
- Recruit some volunteers that represent the demographic characteristics of the audiences the theater is trying to develop.
- Hold an annual party to thank the theater's volunteers and to recognize and reward outstanding volunteer contributions.

The Lakeland Theatre (Littleton, North Carolina) provides these brief descriptions of volunteer duties to help new volunteers find the role that best fits their interests and skills and to succinctly explain what each role involves:

PRODUCTION POSITIONS

Actor: Open auditions are held for each production at Lakeland for interested volunteers to try out for plays. Previous acting experience is not required. Actors must attend all rehearsals and performances. Lakeland does not use understudies.

Assistant director (AD): Serves as assistant to the director, holds production meetings and fills in for any missing crew person during the run of the show. The AD should have previous experience volunteering with Lakeland, preferably as stage manager.

Director: Responsible for setting audition and rehearsal dates, selecting the cast and leading those cast members through the rehearsal process. Directors must have previous experience at Lakeland as an Assistant Director.

Stage manager (SM): Selects the crew members and supervises the cast and crew during rehearsals and performances. Calls the light and sound cues from either the booth or backstage, keeps in touch with the assistant stage managers back stage. The SM is expected to attend all rehearsals and must be present for every show. The SM has many other responsibilities, including telling actors when to come to rehearsals and performances, giving line cues for rehearsals off book and being present at brush-up rehearsals. Stage Manager must have previous experience as Assistant Stage Manager at Lakeland.

Assistant stage manager (ASM): One or two ASMs are used for each show. The ASM is the stage manager's assistant and does everything the stage manager does, to a lesser degree. When the SM calls the show from backstage right, the ASM follows his/her direction on back stage left. When the SM calls the show from the booth, there is an ASM on both stage right and left.

Lighting design: Works with the director to create the proper lighting effects for the show. Design work is usually done before the beginning of dress rehearsal week (or H Week). This person hangs and focuses the lights. Training from an experienced lighting designer is recommended before designing lights on your own. Request to work as assistant to the light designer on a Lakeland show.

Lighting technician: Works in the light booth during the last two weeks of rehearsals and at each performance to execute the lighting cues at the SM's request. Previous experience is not necessary, but the person must be trained on Lakeland's lighting system.

Sound designer: Works with the director to create any sound effects and music that will be used during the show. This usually includes recording music and sound effects from sound libraries.

Sound technician: Works in the booth during the last two weeks of rehearsals and at each performance to insert sound cues at the stage manager's signal. Previous experience is not necessary, but the person must be trained on Lakeland's sound system.

Properties (props): Works with the director and SM in deciding which props will be used. This may involve pulling props from our storage and/or locating props elsewhere. The props chair is also responsible for assisting the SM in gathering a stage crew to work backstage during performances.

Stage crew: Duties as assigned by the SM. May include moving set pieces on and off stage, organizing, presetting and putting away props. Must be present during the last two weeks of rehearsals and at each performance. This is an ideal position for getting to know the theater and how its backstage operations work.

Costume design: Works with the director to select costumes for the show, which may involve pulling costumes from our storage, buying clothes from stores and second-hand shops, altering clothes and sewing costumes from scratch. Sewing skills are vital, and it helps to be able to organize seamstresses to sew to your requirements. Costume designers also work with the director to accessorize actors with shoes, hats, jewelry, etc.

Wardrobe chair: Works with the costume designer and the director to organize all costumes through the run of the show. This may involve presetting costumes in back stage areas and assisting actors with quick costume changes. The wardrobe chair also makes sure all costumes are in good repair, clean and pressed. Simple sewing skills are needed to sew buttons or repair rips. The wardrobe chair is responsible for selecting a crew to assist as needed.

Wardrobe crew: Works with the wardrobe chair to organize and prepare wardrobe during the show. The crew assists the chair in any way needed, including helping actors with quick changes, organizing costumes between shows and helping to launder or repair costumes. No previous backstage experience is necessary.

Set construction: Any number of volunteers is needed to help build sets under the direction of the set designer. People can be used during the day and evening to work in the Lakeland set shop. Carpentry skills are helpful but not necessary; work is done under the direction of the director or artistic director.

Set designer: Works with the director in designing the set. Directs the set crew in set construction.

House manager: Oversees the lobby and all patron areas during performances and is available for audience emergencies. Is responsible for staffing ushers and concession volunteers before the show and at intermission. Enforces the 'no smoking' rule in the lobby, rest rooms and auditorium.

Concessions/bartender: Works before the show and during intermission in the lounge. Must be 21 years old or older as beer and wine are sold.

Usher: The house manager for each performance coordinates a crew of 3-6 ushers. Ushers come to the theater one hour before the show and pass out programs and show people to their seats. No previous experience is necessary.

Box office/will call: Works in the box office or will call window. Must be at the theater one hour before the show. Must be a friendly “people” person.

ADMINISTRATIVE POSITIONS

Board member: Oversees the operation of the Lakeland Arts Center. The BOD monitors the operations and the financial well-being of the theater.

Publicity: Prepares and distributes press releases, assists with the production and distribution of advertising posters and playbills.

Fundraising: Coordinates fundraising activities such as art auctions, yard sales and special theater events. Coordinates the solicitation of funds from grants from public, private and governmental sources.

Program: Coordinates the annual preparation and printing of the Lakeland Arts Center Program. Solicits advertisers for the program and assists with the formatting, editing and updating of information contained in the program.

Office: Assists with general office duties when needed. Duties include filling in for the Managing Administrative Director during her absence, answering telephone requests for information, taking telephone and walk-in reservation requests, greeting visitors, copying materials on a copying machine and performing general office functions.

MAINTENANCE POSITIONS

Landscape: Plans, coordinates and oversees the general aesthetic landscaping to beautify the theater grounds.

Theater improvement: General theater construction requirements, electrical work, plumbing, painting (interior and exterior), drywall repair, equipment maintenance.

Some examples of volunteer handbooks available online:

- Carolina Theatre (Durham, North Carolina)
<http://www.dcvb-nc.com/vic/Wayfinders/Carolina-Theatre-Volunteer-Handbook-Dec-2011.pdf>
- Garden Theatre (Winter Garden, Florida)
<http://www.gardentheatre.org/VolunteerHandbookOctober2010.pdf>
- Cascade Theatre (Redding, California)
<http://www.cascadetheatre.org/files/Cascade%20Volunteer%20Manual-July,%202012.pdf>

- The Chandler Center for the Arts (Chandler, Arizona) has developed a very helpful handbook specifically for ushers. The handbook includes information on everything from dress codes to ways to address patrons. The handbook also includes a volunteer agreement letter, providing volunteers’ assurance that they have read and understand the policies and procedures outlined in the guidebook and that they agree to abide by them. Each volunteer must sign the agreement letter before being permitted to work at the theater.
<http://www.chandlercenter.org/support/volunteers/CCA%20Usher%20Handbook.pdf>

VOLUNTEER AGREEMENT LETTER

I, the undersigned, do hereby acknowledge that I have received, read and understand the policies, guidelines and procedures outlined in my volunteer usher handbook. I understand that I have made a commitment to Chandler Center for the Arts to work as an usher.

I agree to follow the policies and guidelines detailed in this handbook when working at Chandler Center for the Arts, and willingly accept the consequences of failure to do so, which may include dismissal from the usher program at Chandler Center for the Arts.

I also willingly disclose my mailing address, email address, phone number and name to the House Manager at Chandler Center for the Arts for the explicit purposes of facilitating my role as a volunteer usher. I sign this form with the understanding that this information will remain confidential and will not be used for any purpose that is not directly related to my involvement as a volunteer with Chandler Center for the Arts.

Please note: You are not creating a “contract” with CCA by signing this form. If you volunteer at the CCA, both you and the CCA have the right to end this relationship at any time for any reason.

The Chandler holds a quarterly meeting for all volunteers, giving them an opportunity to socialize while also providing updates on current issues and procedures. It also produces and distributes a volunteer newsletter, The Starburst Volunteer News.

- The Ruth Eckerd Hall (Clearwater, Florida) requires each volunteer (or staff member) to undergo a criminal background check.

**BACKGROUND CHECK AUTHORIZATION FORM
CONSENT FOR CRIMINAL BACKGROUND HISTORY CHECK
AUTHORIZATION/WAIVER/INDEMNITY**

Each employee or volunteer to be screened must sign an authorization/waiver/indemnity form, giving approval for Ruth Eckerd Hall, Inc. to perform a criminal background check.

I hereby give my permission to Ruth Eckerd Hall, Inc. to obtain information relating to my criminal history record. The criminal history record, as received from the reporting agencies, may include arrest and conviction data as well as plea bargains and deferred adjudications and delinquent conduct committed as a juvenile. I understand that this information will be used, in part, to determine my eligibility for an employment/volunteer position with this organization. I also understand that as long as I remain an employee or volunteer here, the criminal history records check may be repeated at any time. I understand that I will have an opportunity to review the criminal history as received by Ruth Eckerd Hall, Inc. and a procedure is available for clarification if I dispute the record as received. I also understand that the criminal history could contain information presumed to be expunged.

I hereby affirm that my answers to the foregoing questions are true and correct and that I have not knowingly withheld any fact or circumstances that would, if disclosed, affect my application unfavorably. I understand that any false information submitted in this application may result in my discharge.

I, the undersigned, do, for myself, my heirs, executors and administrators, hereby remise, release and forever discharge and agree to indemnify the Ruth Eckerd Hall, Inc. and each of its officers, directors, employees and agents and hold them harmless from and against any and all causes of actions, suits, liabilities, costs, debts and sums of money, claims and demands whatsoever (including claims for negligence, gross negligence, and/or strict liability of the Ruth Eckerd Hall, Inc.) and any and all related attorneys' fees, court costs and other expenses resulting from the investigation of my background in connection with my application to become a volunteer/staff member.

RESOURCES : ORGANIZATIONS

American Association of Community Theatre provides networking, resources and support for community theater organizations and individuals involved in community theater. AACT's online resources include a guide to running a theater, with sample bylaws and articles of incorporation.

American Association of Community Theatre
1300 Gandy Street Fort Worth, TX 76107
(866) 687-2228
www.aact.org

American Society for Theatre Research is an academic-leaning organization that encourages research and scholarship on theater history in the US and abroad. It publishes a scholarly journal – *Theatre Survey* – and sponsors several scholastic awards.

ASTR
PO Box 1798 Boulder, CO 80306
(303) 530-1838
www.astr.org

Americans for the Arts serves as a national advocate for “organizations and individuals who cultivate, promote, sustain and support the arts in America.” Its Arts and Economic Prosperity Calculator, available on the organization's website, helps theaters and other arts venues calculate their economic impact.

Americans for the Arts
1000 Vermont Avenue NW, 6th Floor Washington, DC 20005
(202) 371-2830
www.americansforthearts.org

ArtPlace America is a consortium of 13 foundations and six banks that pool their resources to award grants to arts organizations involved in creative placemaking. ArtPlace America's grants have supported cultural planning, architectural design, performing arts and “magic moments” (such as special events and public art projects), particularly those that have catalytic impact on their communities.

ArtPlace America
8 E. Randolph Street, #2603 Chicago, IL 60601
www.artplaceamerica.org

Arts Midwest provides a wealth of information and services to arts organizations in the Midwest, including training programs, an annual conference and publications.

Arts Midwest
2908 Hennepin Avenue, #200 Minneapolis, MN 55408
(612) 341-0755
www.artsmidwest.org

Association of Performing Arts Presenters is a service, advocacy and professional organization for performing arts presenters. Its annual conference, held in New York City each January, typically attracts more than 3,000 professionals involved in performing arts.

Association of Performing Arts Presenters
1211 Connecticut Avenue, NW, Suite 200 Washington, DC 20036
(888) 820-ARTS
www.apap365.org

CinemaTreasures is an online catalog of more than 30,000 historic theaters around the world, assembled wiki-style, with the help of thousands of volunteer information contributors. It catalogs mostly movie theaters, but there are quite a few performing arts theaters included, also. Embedded in the theaters' descriptions are hundreds of inspiring success stories (along with a few demolition tragedies).

Cinema Treasures, LLC
PO Box 642957 Los Angeles, CA 90064
www.cinematreasures.org

Iowa Arts Council promotes policies and programs that benefit the arts in Iowa. It provides small grants (typically under \$10,000) in several categories (including job creation, operating support and rural arts development) to nonprofit organizations.

Iowa Arts Council, Iowa Department of Cultural Affairs
600 East Locust St. Des Moines, IA 50319-0290
(515) 242-6194
www.iowaartscouncil.org

Iowa Community Theatre Association supports community theater groups throughout the state, disseminating information and encouraging community theater groups to share ideas. It offers an annual awards program and a small grant program to support community theater activities.

Iowa Community Theatre Association
4740 Iowa Street Newton, IA 50208
(515) 822-1875
www.iowacommunitytheatres.org

League of Historic American Theatres is a professional network of people and organizations involved in managing and preserving historic theaters. It offers an annual conference, an online guide to rescuing and rehabbing historic theaters and a peer advisory service – but its most valuable resource is arguably its active listserv, providing peer-to-peer ideas and advice

League of Historic American Theatres
2105 Laurel Bush Road, Suite 201 Bel Air, MD 21015
(443) 640-1058
www.lhat.org

National Arts Marketing Project, a program of Americans for the Arts, publishes a newsletter and sponsors workshops and an annual conference to help arts organizations improve their marketing effectiveness. The conference, held each November, is particularly popular, attracting over 600 participants in 2013. Videos of some of the sessions from the previous year's conference are available on NAMP's website for free. The website also includes a compilation of the 50 best Tweets from the previous year's conference. For 2012, these include:

- “Lapsed buyers are like dates: you haven't called them in a while and maybe they've forgotten how cute you are.”
- “Redefine ‘audience’ to include all, with meaningful relationships, not just ticket buyers.”
- “Stop thinking of companies as just a building or a checkbook. Then you can begin thinking of true partnerships.”

National Arts Marketing Project
Americans for the Arts
1000 Vermont Avenue NW, 6th Floor Washington, DC 20005
(202) 371-2830
www.artsmarketing.org

National Association of Theatre Owners is an association of movie theater owners, providing advocacy for the motion picture exhibition industry. It offers training videos for movie theater workers, guidance on opening a movie theater, and data on admissions, ticket prices and box office grosses, among other services. NATO sponsors CinemaCon, the largest annual gathering of movie theater owners in the world, featuring a trade show with more than 500 vendors.

National Association of Theatre Owners
750 First Street, NE, Suite 1130 Washington, DC 20002
(202) 962-0054
www.natooline.org

National Endowment for the Arts is an independent agency of the federal government that provides grants to individuals, nonprofit organizations and communities to support artistic excellence, creativity and innovation. It also facilitates and sponsors arts-related research and offers a wide range of publications on its website, including *All America's a Stage: Growth and Challenges in Nonprofit Theater*.

National Endowment for the Arts
1100 Pennsylvania Avenue, NW Washington, DC 20506-0001
(202) 682-5400
www.arts.gov

Theatre Communications Group has grown from an organization focused on fostering communication between professional, community and university theaters to one that provides a wide range of research publications, conferences and events. TCG also offers grants to theater companies and artists. It conducts an annual fiscal survey of its 700-plus member theaters, providing benchmark information on theaters' income and expenses.

Theatre Communications Group
520 8th Avenue, 24th Floor New York, NY 10018-4156
(212) 609-5900
www.tcg.org

United States Institute for Theatre Technology is a professional organization for theater-related design, production and technology workers. In addition to its annual conference and its journal (*Theatre Design & Technology*), it offers small research and travel grants, safety resources and periodic training programs on theater equipment, costume and scene design and construction, and other technical aspects of theater production.

United States Institute for Theatre Technology
315 South Crouse Avenue, Suite 200 Syracuse, NY 13210-1844
(800) 938-7488
www.usitt.org

RESOURCES: PUBLICATIONS

This is a small collection of very helpful publications available online, for free.

A New Framework for Building Participation in the Arts, by Kevin F. McCarthy and Kimberly Jinnett. RAND, 2001.

<http://www.wallacefoundation.org/knowledge-center/audience-development-for-the-arts/key-research/Documents/New-Framework-for-Building-Participation-in-the-Arts.pdf>

Arts for All: Connecting to New Audiences, by The Wallace Foundation, 2008.

<http://www.wallacefoundation.org/knowledge-center/audience-development-for-the-arts/strategies-for-expanding-audiences/Documents/arts-for-all-connecting-to-new-audiences.pdf>

Building Arts Organizations that Build Audiences, by The Wallace Foundation, 2012.

<http://www.wallacefoundation.org/knowledge-center/audience-development-for-the-arts/strategies-for-expanding-audiences/Documents/Building-Arts-Organizations-That-Build-Audiences.pdf>

Building Deeper Relationships: How Steppenwolf Theatre Company is Turning Single-Ticket Buyers Into Repeat Visitors, by Bob Harlow, Thomas Alfieri, Aaron Dalton, and Anne Field. Bob Harlow Research and Consulting, 2011.

http://mainearts.maine.gov/CMSContent/arts_media/2012_BuildingRelationships.pdf

Cultivating Demand for the Arts, by Laura Zakaras. RAND, 2008.

http://www.rand.org/content/dam/rand/pubs/monographs/2008/RAND_MG640.pdf

The Experts' Guide to Marketing the Arts, Arts & Business Council of Americans for the Arts, 2010.

<http://artsmarketing.org/resources/practical-lessons/practical-lessons>

The Performing Arts in a New Era, by the RAND Corporation, 2001.

http://www.rand.org/content/dam/rand/pubs/monograph_reports/2007/MR1367.pdf

A Practical Guide to Arts Participation Research, Report #30, Washington, DC. NEA, 1995

<http://arts.gov/sites/default/files/NEA-Research-Report-30.pdf>

Safe Stages, by Theatre Alberta, 2006.

<http://www.theatrealberta.com/safe-stages/>