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THEATRE COMMUNICATIONS GROUP, INC.

## CENTERPIECE

### FOCUS ON: GOVERNANCE

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### ADVOCACY: MAKING THE CASE FOR THEATRE

BY JAAN WHITEHEAD

Advocacy is the public face of theatre; it is how we tell our communities who we are and what we do and how we ask them to support our work. Because of the extensive debates concerning the NEA in the 1990s, we have tended to think of advocacy as political lobbying of our local, state and national governments. But it has always meant more than this, particularly in the context of governance. Trustees not only bring their talents and resources to the theatre but help take the talents and resources of the theatre to the community. This is their role as “ambassadors” to the community. And, of course, telling the story of who we are and what we do is a key part of marketing and fundraising, areas in which trustees also are deeply involved.

For its Fall Forum early in November, TCG focused on these broader meanings of advocacy, particularly the questions of how effectively we are defining and communicating our missions to our communities and what tools we might use to improve both their understanding of and support for our work. Entitled *Making the Case for Theatre: Positioning, Values and Practices*, the Forum brought together about 80 managers, marketing directors, fundraising directors, trustees and artistic directors in Denver for a three day meeting. In an effort to share the Forum with a wider audience, four trustees who attended the conference agreed to cover different sessions and contribute what they learned for this *Centerpiece*. The four “reporters” are Ann Gilbert from the Round House Theatre in Silver Spring, Maryland, Judy Hansen from Milwaukee Repertory Theatre, Diane Morrison from Signature Theatre Company in New York and Nancy Roche from Center Stage in Baltimore. Since the Forum included a range of ideas and each trustee covered several sessions, I have organized their reports into the three broad categories of marketing, outreach and fundraising. In addition to their reports, an excellent bibliography of resources on advocacy, which was given out at the Forum, is included as an insert to this *Centerpiece*.

The Forum and reports presented here are one side of a dialogue about the increasing importance and complexity of advocacy in today’s society. The other side is how artists themselves see their work and how they define the value of their work to the community. I think that it is in the richness and creativity of this dialogue that we can hope to find ways to better connect our art and theatres to our society.

Governance *Centerpiece* Curator: Jaan Whitehead, Trustee, A Living Stage

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# ***MAKING THE CASE FOR THEATRE: POSITIONING, VALUES AND PRACTICES***

**BY ANN GILBERT, JUDY HANSEN, DIANE MORRISON  
AND NANCY ROCHE**

## **KEYNOTE ADDRESS**

Blue skies, crisp fall air and a halo of mountains served as the backdrop to the Denver Center for the Performing Arts on the first day of the Fall Forum. **Michael Janeway, director of the National Arts Journalism Program at Columbia University, delivered the keynote address.** His call to action was based on the understanding that arts advocacy must be rooted in the ability to speak where others are listening from.

He began his remarks by sharing the results of a ten-year Columbia University study, *Reporting the Arts*, that examined how media coverage of the arts has evolved. Today, he argued, newsprint and public radio are the only real places of arts journalism and, even there, daily arts coverage is rare. Most arts reporting takes place on the weekend. There is little “conversation” between the media and the arts. In fact, about half of the arts coverage consists of arts institutions’ own listings of events rather than actual reporting.

Janeway urged that theatre practitioners engage editors, including editorial page editors, in a dialogue that affirms our role in the community as civic leaders.

- ❖ “Go where they live” and be prepared to talk about your value to the community.
- ❖ Try to establish a sense of common purpose so you can collaborate with editors in addressing issues of public trust.
- ❖ Most important, do your homework before you meet and think through a strategy that might include such things as:
  - ❖ Develop an innovative case that relates to civic life (an area of interest to editors today),
  - ❖ Give them some “news” about what you are doing,
  - ❖ Join with other not-for-profits to make the “story” bigger and showing how your work intersects with other areas of the community outside the arts,
  - ❖ Set a positive agenda; start the conversation by mentioning coverage in the paper you liked, and as you talk about what you are doing, relate it to broad social issues with shared values such as education.

He pointed out that it is important to recognize that editors were pummeled in the ‘90s with mergers, personnel turnover and a declining readership. Good editors struggle with standards and the conflict between their ideals and practical demands. It is hard for editors to be creative when they are on a treadmill all the time. There is an opportunity here for theatres to establish a partnership with editors that identifies common concerns and reaffirms a common interest in community issues. And it also is important to remember that, although you are deeply aware of the activities at your theatre and in the community, never assume the media knows about them. You are always an educator.

## **MARKETING**

### ***Why Theatre Matters: Articulating Our Case***

One needn’t look back too far to recall the culture wars that began in 1994 with Newt Gingrich and the “Contract with America.” That year NEA funding was cut, and it was not until 2000 that the NEA received its first modest funding increase. The arts community went on the defensive. We used the cost of a stamp to express the cost of arts funding to each American. We talked about economic activity generated by the arts. Even so, we knew that the arts had not yet found a persuasive way to talk about our value to our communities and to our country.

**Theatre veteran Ed Martenson tackled this topic head on in the Fall Forum’s first plenary session, *Why Theatre Matters*.** Ed served as director of the NEA Theatre Program from 1982-1986. He has been the managing director of the McCarter, Yale Repertory and the Guthrie theatres and is currently program director for Executive Education for National Arts Stabilization.

Ed's fundamental concern is that we express the mission of our theatres with passion. He believes that our mission is the most important tool we have to articulate our case. It inspires our stakeholders and provides ammunition when we compete for support with educational, social service, or other worthwhile institutions.

Although our mission should be the essential tool in describing our work to others, Ed's experience in leading NAS's executive seminars demonstrates that too many theatres do not have a clear view of their mission and/or do not articulate this mission persuasively to others. Ed asked 31 theatres to separately rank their (1) core values, (2) purposes and (3) goals. Although 17 theatres ranked "high quality and excellence" as their number one value, there was little other consensus among the theatres regarding their values. When the theatres ranked their purposes, five theatres (the most in agreement) said, "home for social relevance," four said "exploring human experience and spirit," and four said "employing artists." Finally, when these 31 theatres were asked to rank their goals, 17 placed recognition first and 10, a good facility.

Clearly, something is missing. Although the range of answers contains germs of validity, they must be broadened and elevated to adequately communicate our value to our community. They reflect our internal perspective – i.e., "Here's what we do and here's how you can help us." From the external perspective of our communities, this is not enough. We are too timid; we need strong and clear goals that can motivate our communities.

Ed also pushed for a more careful examination of that we say about ourselves and our mission, suggesting that we "peel the onion." What do we really mean when we "explore human experience and spirit?" Why is this exploration important? What do we mean by "quality of life?" Why is it important to explore the experience of "the other?" We need to express our passion and conviction about the necessity of theatre. We need to see ourselves as permanent, essential treasures. Only our own profound belief in the mission of our theatre will prevail.

### *Proving Our Case: Effective Market Research*

**Mark Shugoll, a trustee of Arena Stage and chief executive officer of Shugoll Research, a marketing firm in Washington, used the Friday morning plenary session to share the kinds of market research he has done for theatres in Washington and Baltimore, market research being one of the tools theatres can use to better understand and make their case.** He said that theatres need to understand their audience, subscribers, donors and target markets better. Market research can help a theatre to:

- ❖ Understand why subscribers did not renew and what kinds of subscription packages they are seeking.
- ❖ Identify theatregoers and find out why they do not attend performances.
- ❖ Convert subscriber non-donors to donors.
- ❖ Aid in capital campaigns.
- ❖ Attract diverse audiences.
- ❖ Find out what amenities and services audiences want.
- ❖ Determine pricing sensitivity.
- ❖ Aid in positioning the theatre in the arts market.
- ❖ Evaluate the subscription brochure and other publications.
- ❖ Help attract young theatregoers.

In discussing the value and forms of market research, Mark distinguished between primary research, which is data originated by the researcher for a specific study, and secondary research, which is data collected from existing sources compiled by others. Obviously primary research is more expensive and time consuming, but it also gives more information specific to your theatre.

Mark also distinguished between qualitative research, which involves a small number of people in an in-depth discussion such as a focus group where a great deal of diverse information can be gathered, and quantitative research, which involves polling people about a set of straight-forward questions where the answers can be tallied numerically. Qualitative research is expensive – about \$10,000 per focus group – and the results cannot be used for projections since each group is so small. However, a much deeper picture of people's views can be gathered. (He stressed that you should always do at least two focus groups since any one group may be biased or influenced by group dynamics.) There are many ways of doing quantitative research such as mail, telephone and fax surveys or by in-person interviews going door-to-door or at a particular location where people gather. The response to such surveys is lower and there is much less control over who the participants are, but these surveys are less expensive.

Although theatre marketing budgets are often small, Mark believes that all theatres would benefit from some type of market research, even if it is a survey put inside a theatre program. However, if you prepare a survey without the help of a professional researcher, be sure that your questions provide the information you want and that they can be easily answered by the respondents.

### *Success Stories: Pittsburgh's "Bringing the Arts to Life" Campaign*

**In one of the breakout sessions, John Dymun, chairman and creative director of Dymun & Company, talked about ZMET, the Zaltman Metaphor Elicitation Technique.** The brainchild of Jerry Zaltman of the Harvard Business School, this technique was used in Pittsburgh to identify and develop a program encompassing the arts.

On any given subject, ZMET attempts to gather thousands of mental images and then piece them together into a coherent picture, a mosaic of human feeling. In Pittsburgh, the research participants were asked to collect ten pictures from any source that captured their feelings about the arts. A week or two later, the participants spent two intense hours privately discussing their feelings with a specially trained interviewer. Then the participants sat down with a graphic artist who walked them through an exercise of combining their images into a single, computer-assembled collage.

The goal of this process was to look for "deep metaphors," hidden feelings and thoughts described in terms of something else. From this process an attractive graphic design and slogan was developed: *The Arts Bring Life to Life*. This new slogan was adopted by many arts organizations and became part of a large arts media campaign in Pittsburgh. The slogan appeared on transit posters, in airport walkways, on TV and radio commercials and at the Three Rivers Arts Festival, creating greater visibility for the arts in the community. It was a real success story.

### *Success Stories: San Francisco Bay Area Social Marketing Project*

**Sabrina Klein, executive director of the Julia Morgan Center for the Arts in San Francisco discussed a long-range study in the Bay Area designed to promote the social and personal benefit of theatre utilizing the principles of social marketing.** Social marketing studies behavior that is value-laden and culturally embedded and then uses this information to address people at a deep level of personal values and perceived needs. This approach is a way of identifying values that can be appealed to in order to raise awareness of the essential public benefit of the arts and to show that the arts are as necessary for a healthy society as clean air and free speech. In the Bay Area, social marketing was used to argue for establishing core curriculum arts education in public schools, for identifying public policy advocates, for expanding media coverage and for stimulating public dialogue about the performing arts and their value to society.

### *Positioning Your Theatre with the Available Tools*

**In a third break-out session, Howard Sherman, executive director of the O'Neill Theater Center, asked hard questions to challenge the audience to examine the mechanisms they are using in presenting their theatres to the community.** Do we spend too much time selling our plays? Are we spending enough time selling our institutions? Since institutional positioning is important, do we look at our tools – brochures, newsletters, telemarketing, press – and make sure our message is consistent and broadly directed? Is our mission statement clear and is it reinforced and expressed to our audiences with the tools at our disposal?

### *Controlling Our Public Image: Branding*

**Finally, one of the last breakout sessions on Friday focused on "branding," the idea of establishing a public identity that is easily recognizable and understood like the "brands" of consumer products.** Heather Fitzgerald, director of marketing communications at the Iliff School of Theology and former staff member at the Denver Theatre Center, stressed that you need to know whether customers see you as you see yourself. Or, are you so inside your work that you are assuming – perhaps wrongly – that you are communicating well with the outside world. If customers view you differently than you view yourself, it is the customers who are in charge of your "brand," not you. She suggested that you can let your customers help define and develop your brand in terms of how you benefit them. And she discussed how the Denver Center Theatre Company used this approach to successfully clarify their identity in the Denver community.

## OUTREACH

### *Strange Bedfellows or Best Buddies: Conversations with Elected Officials*

**Gully Stanford, director of public affairs of the Denver Center for the Performing Arts, moderated a breakout discussion that explored the passage of a cultural tax referendum in Colorado.** The key points he made were: know your politicians, build and nurture relationships through trustees in times of non-crisis, be bi-partisan, get to know who is in power over time and understand that loyalties and friendships are critical. To this end, boards might consider establishing a government liaison committee. When issues of government support are substantial, it is important to identify a leader who can act as a catalyst in the theatre and in the community. It also is important to have good research and to get professional advice. The arts are too shy about lobbying; we need to stay politically connected. We should become marathoners not sprinters and come from the mindset “I support the arts, I vote and there’s a lot of me out there.”

### *Changing Audiences and Changing Lives: Partnerships in Education*

**In this breakout session, *Changing Audiences and Changing Lives: Partnerships in Education*, four participants described Denver’s Alliance Project.** The Alliance Project is a program designed to bring arts education to Denver schools, which is sponsored by eighteen arts organizations that contribute specially designated revenue for the project. Charlotte Talbert, the director of the project, worked with parents, school districts and the arts organizations to develop the project.

A year was spent assessing the needs of the schools. One of the obstacles the program faced was that the school districts did not want to take the time away from traditional learning. Many educators do not consider the arts a discipline that can be tested as, for example, reading and math can. The sad reality is that today’s school children are not being exposed to arts programs as earlier generations were. Few music programs exist, except for high school bands that perform at football games. Theatre is seldom, if ever, taught, although many schools produce plays. A further obstacle was found in the home. With two working parents, families give a low priority to the arts. Weekends are commonly spent doing errands, and family outdoor activities often replace indoor cultural activities.

All participants felt the Alliance program has been successful, in large part because the arts were tied in with the school’s curriculum; Charlotte also held monthly meetings with the school administrators. Arts activities such as writing monologues and performing oral histories with students are now part of regular school activities.

## FUNDRAISING

### *Closing the Deal: Motivating People to Make the Ask*

Trustees are faced with increasing pressure to raise funds either through annual fund drives, capital campaigns, or endowment drives. **In Friday afternoon’s plenary session, Sonya Champion of The Collins Group talked about how to motivate solicitors and better understand the needs of donors.** She believes that, while it is still critical to understand that people give to people, a new type of donor is emerging. These new donors see themselves as investors and as such are interested in value. They want their investment to grow and it is this growth that supplies the trust that can transform such a donor into a lifelong friend of the theatre. While recognizing the different needs of the new donor, it still remains fundamental to steward these donors. Donors must be kept informed and made to feel as if they belong. When approaching such donors for an annual gift, set aside the speech on the status quo; instead, talk about what the annual fund allows you to do. This approach also works well for capital and endowment campaigns. Present the perspective donor with the theatre’s future plans and show them how they can play a role in these plans through cash, in-kind gifts or gifts of expertise. And solicitors need to know not only the mission of the theatre but the theatre’s organizational values. Talking about these values connects the community to the theatre. You should ask yourself, “What would be lost to the community if the theatre left and additionally what does the theatre offer the community?” Individual donors are becoming an increasingly important source of funds and better means of stewarding these donors are needed.

Sonya also discussed how the act of fundraising is a research tool that can be extremely informative when launching a capital campaign or endowment fund drive. Along with trustee networking in the community, such information can be used to evaluate the potential of possible fundraising campaigns.

## *Success Stories: Guthrie Theater Fundraising Feasibility Study*

**Besides his plenary session on articulating our case, Ed Martenson conducted a breakout session on his experience at the Guthrie in using a feasibility study as the basis for a very successful capital fund drive.**

Obviously, moving from an annual campaign to a capital or endowment campaign requires additional tools to be successful. Many theatres conduct a feasibility study to determine whether the community accepts the theatre's plans and, equally important, if the theatre is ready to launch their campaign. It is important to interview community leaders and major donors to expand your knowledge of the outsider's view of the theatre. This process can identify potential prospects as well as generate ownership of not just the theatre but also the campaign.

Campaigns have the possibility of competing with annual giving, but you can position your "ask" to cover both funds over a period of time. Perhaps you can ask for a capital gift with a proviso that x% of the dollars will go automatically into the endowment. For example, you can ask for a gift of \$50,000 over 5 years with \$5,000 going into the capital campaign and \$5,000 into the annual fund each year. Be creative. Have a clear strategy to identify and meet your donors' needs and concerns.

On the flip side, if your feasibility study comes back with negative results, you must look long and hard at the information contained in the report. Tough decisions may need to be made. Concerns about the clarity of the mission, the proposed direction of the theatre and campaign strategies may come to light. Needless to say, the board and staff need to take a step back and examine these issues and determine what is real and what is actually poor perception and lack of understanding in the community. If it is poor perception, communication needs to change.

If major questions about the theatre have been voiced, it is a clear sign that the theatre is not ready to start a campaign. It may take a few months or years to address these issues. Objectives for the campaign and the theatre may have to be revised and rearticulated to the community. If questions still remain about the feasibility of a successful campaign, do another study.

## *Dot.com and Dollars: Challenges of New Philanthropy*

In 1982, there were 13 billionaires in the country. Today, there are 267. During this same time period, the number of private foundations has increased by one-third and private foundation assets have increased 1,000%. The growth in private wealth in the past twenty years has been enormous. Entrepreneurs and venture capitalists have accumulated much of this wealth through a combination of high-risk, aggressive use of money and marathon hours of work.

In a breakout session on *Dot.com and Dollars*, Susan Trapnell, executive director of the Seattle Arts Commission, discussed this new age of philanthropy, focusing particularly on "young people who've come into vast wealth and how we get at it." When these successful capitalists contribute to a not-for-profit, they think of it as an investment. They expect our organizations to pass due diligence, to manage and plan for growth and to steward funds wisely.

Susan juxtaposed the terms "market capital" (earned revenue) and "civic capital" (contributed revenue) to delineate sources of revenue in terms that make sense to venture capitalists. She argued that no business is more entrepreneurial than theatre and the arts. No business is more skillful in using both market capital and civic capital to produce its work and to add value. Because venture capitalists are fluent with the need for "risk capital" to expand our institutions, they expect thoughtful strategic planning. They ask: What is your plan? What is the payoff? Our job is to articulate what we can do if we have their support.

Sometimes, it is important to educate these youthful entrepreneurs. What is a not-for-profit? What are the uses of contributed revenue? Why are our services worth providing even if they do not make a profit? How does theatre contribute to the community? Also, endowments tend to be a tough sell to new money and Susan suggested that the days of unrestricted endowment may be over. As theatres and as trustees, we must be clear on the uses of our endowment – how we will be able to do more with it, not that we will need to raise fewer annual dollars. As Ed Martenson suggested in his opening plenary session, our job is to understand and to articulate the importance of the arts and of our theatre to civic and cultural life. We are building a civilization and we need to educate our investors about long-term payoff.

Above all, in our efforts to gain access to this new wealth, we need to remember that all giving is the result of stewardship. We can't skip to the "ask" without the concentric circles of cultivation that develop the connection to the art. Maintain communication. Be in touch. All of this comes under the heading of good old-fashioned development.

In the context of a thriving economy and unprecedented accumulated wealth, theatres with a clear mission and a strategic plan have a remarkable opportunity. Susan concluded, “This generation is ripe for philanthropy.”

### *How Funders Think: Intersections with Grantmakers*

**One further session on fundraising included a discussion by three different kinds of funders – a public funder, a corporate funder and a private foundation funder – on how they think.** Joining this session too, Susan Trapnell of the Seattle Arts Commission talked about how difficult it is for public funders to have lofty conversations about the arts due to the constant pressure of politics and daily demands. She stressed how important it was for the arts to educate public funders on the wide range of ways they can help the arts, from helping make it possible for artists to live in the city to helping to provide education for the next generation of artists. She also pointed out that all funders have stakeholders of their own who must be satisfied – in her case, the citizens of Seattle.

Laysha Ward from the Target Foundation stressed the importance of developing advocates within corporations in your area and that Target now does most of its giving through its branches. She also said that arts organizations should go for more than dollars from corporations; they are good sources of technical assistance, marketing expertise and potential board members. In many ways, arts organizations ask too little. And, as with public funders, arts organizations need to recognize that corporations have their own stakeholders, their shareholders who must be convinced of the value of their charitable giving.

Finally, Robert Marx explained how his foundation, the Fan Fox and Leslie R. Samuels Foundation in New York, has a very different – and he believes rapidly disappearing – view of giving. His foundation still maintains older ideals of philanthropy in which gifts are not tied to a quid pro quo. Instead, the foundation believes that funders should not intrude on the mission or programming of arts organizations. It should spot talent, provide support for it and then go away. The goal is to serve the artists and the art; that is what serves the public. Enhancement of the giver is not part of this mission.

Check out TCG’s Web site at [www.tcg.org](http://www.tcg.org) for a partial audio Webcast of Michael Janeway’s Keynote Address as well as additional text and notes from various sessions. Also on the site are the Fall Forum agenda, links to related sites, bios, participant list and other information.

*This article was written by Ann Gilbert, Trustee, Round House Theatre; Judy Hansen, Past President, Milwaukee Repertory Theater; Diane Morrison, Chairman, Board of Trustees, Signature Theatre Company and Nancy Roche, Past President, Center Stage. All of the authors are members of TCG’s National Council for the American Theatre.*