

MORE THAN MERE SURVIVAL
The Future for Theatres of Color

A Report of the Theatre Communications Group Convening
White Oak Plantation, Yulee, FL
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I. MEETING THE CHALLENGE—INTRODUCTION

“Our challenge is not only to set the bar, but to raise the bar in setting it.”

Two years ago, Ron Himes, Founder and Producing Director of the St. Louis Black Repertory Company, telephoned Ben Cameron, Executive Director of Theatre Communications Group, and expressed his concern for the survival and future of American theatres of color in general and African American theatres in particular. The time had come, he said, to take stock and “move these organizations forward as a community.” He wanted to know how TCG could and would help.

The tragic events of September 11 and their personal and economic aftermath temporarily derailed continued conversation, which was reignited a year later with the decision to convene a conference of representatives from African American, Latino and Asian American theatres at White Oak Plantation in Yulee, Florida. This convening was viewed as a catalytic step, mirroring the TCG process that ultimately resulted in the creation of the New Generations Program in 1999. With support from The Howard Gilman Foundation and The Nathan Cummings Foundation, leaders from 21 theatres met from September 11-14, 2003 at White Oak. This report attempts to capture the complexity of those discussions and the potential “next steps” suggested by the participants.

Guided by an Advisory Task Force, six critical themes were distilled from two conference planning sessions, to serve as touchstones for discussion at White Oak. These themes permeated the deliberations, both implicitly and explicitly, over the course of the two days:

- Funding;
- Artistic process and the work;
- Audience composition;
- Organization development of leaders, staff and artists;
- Education and training programs;
- Media and criticism.

Of these, funding was the unmistakable and inevitable *uber*-consideration. Frank, sometimes painful and often impassioned conversation among the White Oak conferees provided inspirational, yet sobering, insights into the sustainability of theatres of color, and the challenges—shared and unique—which they confront.

The first mandate was to agree on ground rules for the discussion. Four focusing principles were proposed:

- *Define the current realities in clear and definite terms.* Recognizing that some things have been “reiterated for the hundredth time,” conferees agree to

- acknowledge [rather than dismiss] the passion and importance of statements that may seem too often stated;
- *Focus on insights into contributing factors.* Move from past frustration with age-old complaints to identify new factors that might impact on these realities;
 - *Distinguish between common threads and unique elements.* Acknowledge that unique experiences exist among the theatres and are as valid and vital as shared concerns;
 - *Identify resources and strategies.* Share information about successful strategies; identify gaps in resources and strategies; direct attention to new strategies.

Following the convening, a White Oak meeting report will be circulated to theatres of color around the country, both to determine whether the issues resonate for the majority and to seek their feedback. A distillation of the meeting notes will appear in *American Theatre* with the understanding that no comments or quotations are to be attributed.

All conferees agreed that though some realities might be unpleasant, it would be important to keep from being “stuck” in a “bitch session” to make best use of this opportunity to be together. Facilitator Diane Burbie of The Aspire Group enjoined the participants to honor the participation of the group. “When you bring passionate, creative people together, the emphasis should be on valuing the diversity of passion, of politics. . . diversity can be lost if the group rushes to consensus too quickly. The quality of what you bring to the table is only honored if it is allowed to be on the table for what it is, to be digested and honored.”

II. SURROUNDED BY GIANTS— HERITAGE & LEGACY

“I feel like I’m in a sequoia forest, because I’m surrounded by giants.”

The Advisory Task Force agreed that some understanding of theatre history in the African American, Asian American and Latino communities would provide a helpful introduction to shared issues among theatres of color in the United States. Each cultural group selected two representatives to prepare and present a very brief history from their cultural perspective. In spite of the necessary brevity, each presentation was rich with detail and insight, surfacing several unifying themes. Hybridity—the merging of cultural traditions—recurred in each cultural history. Stereotyping was another crosscutting artistic experience, as each cultural group grapples with “mainstream” theatre expressions and venues. Perhaps the most critical goal, attributed to W.E.B. Dubois, was embraced by all theatres of color: to create theatre “of, by and near the community.”

African American Theatre

Gary Anderson (Producing Artistic Director, Plowshares Theatre Company, Detroit) and Jennifer Nelson (Producing Artistic Director, The African Continuum Theatre Company, Washington, D.C.) riveted conference colleagues with a summary of the roots of African American theatre. A valuable timeline was prepared by Gary Anderson (with Dr. Addell Anderson) and shared with the conferees, though Anderson and Nelson had time to touch only briefly on a few key movements.

The first Africans arrived in America in 1619. Enslaved and from disparate African backgrounds, the hybridity which will characterize African American culture was already at work. Punished for speaking their own languages and isolated from other people of similar African origin, the process of merging African and European cultures began almost immediately with music and storytelling. Even in those early days, plantation owners were known to hire talented storytellers and musicians from other plantations for special occasions and presentations.

In 1795 the first African American portrayed onstage was Sambo, played by a white actor in blackface, a practice that continued into the 1930’s. Minstrelsy, extending from the mid-19th century and well into the 20th, was cited as a pivotal movement in African American theatre with the complex social conundrum of whites “blackening up” to mimic blacks, followed by blacks satirizing the practice of whites mimicking blacks. Minstrelsy was largely responsible for establishing African American theatre stereotypes.

The first known African American theatre company—the African Grove Company—was founded in 1821, but was short-lived, due in part to journalistic ridicule of the notion of African American actors. Black theatre evolved to keep ahead of what African Americans viewed to be white appropriation of black entertainment innovations, e.g., introducing women onto the stage and integrating music into the telling of a story, which helped to lay the groundwork for the American musical theatre. Another key factor was

the synergy in New York City between the Yiddish theatre downtown and the evolving African American theatre uptown, which met, literally and figuratively, on Broadway. There, Jewish producers often presented African American entertainers that they had discovered uptown to white Broadway theatergoers.

During the Harlem Renaissance, African American writers from other literary forms began to dabble in playwriting: Zora Neale Hurston, Langston Hughes, W.E.B. DuBois. They called for a theatre by, for and in proximity to African American audiences, in contrast to theatre by blacks for white audiences. The Chitlin' Circuit was launched by the Theatre Owners Booking Association, aka Tough On Black Actors, referring to the absence of protections for the interests of African American actors. African American theatres began to grow all over the country, but this proliferation was again short-lived in the face of the Depression. The WPA Federal Theatre Project provided important, albeit limited, resources to train African American people to do a range of jobs in the theatre, creating Negro units in 22 cities. In 1939, black and white stevedores united to fight the union-busting tactics of dock owners, reinforcing the idea of theatre of social ideals, which had grown up with the WPA.

During the 1940's, Abram Hills and Frederick O'Neall established Harlem's American Negro Theatre and were the first producers to move an African American play to Broadway, but their success may have led to their downfall, as they began to target their shows to suit popular audiences, turning away from social action and focusing on star-making. The '50s saw the rise of the modern Civil Rights Movement and theatrical responses by African American artists, particularly in the South. But after the American Negro Theatre, no other African American institutions attempted to produce theatre in "mainstream" venues on a regular basis. Finally in 1959, Lorraine Hansberry's historic *A Raisin in the Sun* wrote theatre history with its renewal of a presence for African American theatre on Broadway.

In the late '60s and through the '70s, African American theatres sprouted outside New York City—in Philadelphia, San Francisco, New Jersey, Minneapolis, St. Louis, New Orleans—enabling artists to present and build a new canon. This decentralization fulfilled the DuBois ideal of theatre in local settings—of, by and near African American communities. The 70's witnessed a shift to theatre of identity, rather than promoting the social and political agendas of the Civil Rights Era. The Negro Ensemble Company was founded in 1967 in New York City by Douglas Turner Ward, Robert Hooks and Gerald Krone around a white producing model, to showcase African American artists and themes. In 1970, Woodie King, Jr. established the New Federal Theatre at Henry Street Settlement, also in New York, and launched the National Black Touring Circuit.

The '80s and '90s saw the reemergence of a modern-day Chitlin' Circuit, with unfortunate associations to money laundering. In more recent times, the Circuit has shifted to legal ownership by multi-media corporations. The concept of *the local* for these highly profitable touring companies has been set aside. In 1989, North Carolina Black Repertory launched the National Black Theatre Festival, and in 1998, the first national African American theatre summit was convened at Dartmouth, aptly named the

African Grove Institute, invoking that first African American theatre institution. African American theatrical stereotypes have become archetypes, intrinsic to American culture, among them, the city slicker, brute, mammy, and today the black angel who appears in films, not to actualize his/her own needs and desires, but those of the white film lead, whether in *The Green Mile*, *The Legend of Bagger Vance*, and most recently, *Bringin' Down the House*. The present is influenced time and again by the past and the cycles of African Americans in theatre and entertainment are uncannily familiar.

Asian American Theatre

Jorge Ortoll (Executive Director, Ma-Yi Theater Company, New York City) and Stefanie Wong (PR and Marketing Manager, East West Players, Los Angeles) led the Asian American heritage and legacy discussion, noting at the outset that this story begins in the mid-19th century with the Chinese, when an almost entirely male immigrant population arrived as contract laborers to construct the Transcontinental Railroad. In the late 1800's, restrictions against immigration from China were imposed, while immigration from other Asian countries increased: first Japanese, then Koreans and Filipinos, and following the Vietnam War, an increasing influx of Southeast Asians and South Asians.

A key difference between African American and Asian immigration was that the latter was largely elective, or compelled by circumstance rather than forcible. Most Asians arriving in the first immigrant waves did not intend to stay, so they initially emphasized their cultural differences; the first Asian cultural expressions in America recalled their countries of origin. Later immigrants, who arrived to make permanent homes in America, brought cultural expressions that began to interface with existing Western theatre. Traditional Asian forms—opera, dance, puppetry—were imported and informed the components of a hybridized form.

In the earlier pre-war period, Asian American theatre artists performed for largely white audiences on what was called the “Chop Suey Circuit,” which mixed Eastern and Western theatre forms. The most well known of these venues, the Forbidden City, provided 2nd and 3rd generation performing artists with opportunities to be seen in more American formats. After World War II, Asian American actors began to appear in film and on television, though usually in stereotyped roles without three-dimensionality. White actors in prosthetic makeup customarily performed characters of any depth or complexity, e.g., Charlie Chan or Olan in “The Good Earth.” Local theatre troupes developed in response to the absence of parts for Asian actors that would allow them to stretch and grow as artists.

Today, 82 theatres are listed on an Asian American theatre information Web site, 32 of which produce on a reasonably regular schedule. 54 of these theatres are in the West, 23 in New York City, and 5 in the Midwest. Of the 32, the six represented at this conference are some of the most active. Asian American theatres clearly share the goal of writing and performance for and by Asian Americans, aimed at both Asian American and general audiences.

In recent theatre history, *Miss Saigon* was an Asian American watershed event, in spite and because of the controversy it aroused. It galvanized Asian American artists to form Asian Pacific Americans to Create Equality and the first “Geishas, Gangsters and Gooks” conference at the Public Theater. In spite of the protest that swirled around *Miss Saigon*, thirty talented Asian American performers were able to find work on Broadway; the absence of roles of substance for those actors to play after the show closed led indirectly to the formation of several new Asian American theatre companies.

The Asian American heritage presentation then turned to the six Asian American conference representatives whose theatres’ beginnings embody a diversity of purpose, organization structure and ethnicity:

East West Players was launched in 1965 by nine dramatic artists, three of whom have since passed away. Founded as a showcase for talent and a place to hone skills, it began by presenting the classics. East West branched out in the ‘70s to include the development of Asian American writers, beginning with Chinese and Japanese American work and heading now into a fourth generation that is more representative of the different Asian immigrant groups that are a part of American culture today. East West Players’ goal is “to tell the stories that the mainstream theatre isn’t telling.”

Pan Asian Repertory Theatre, which celebrated its 25th anniversary in 2003, was the first professional Asian American theatre east of the Rockies. Founded by Tisa Chang, its goal is to present Asian American masterpieces, adaptations of American classics, and the introduction of new work by Asian American writers, which “reflect the evolution of Asians in America.”

Ma-Yi Theater Company was launched in 1989 as a home for Filipino theatre artists, expanding over time to embrace a pan-Asian aesthetic. Recognizing the dearth of stage directors of Asian heritage, Ma-Yi has focused on mentoring directors, as well as nurturing writers and commissioning new work.

National Asian American Theatre Company (NAATCO) was also founded in 1989 by Artistic/Producing Director Mia Katigbak, with a 70’s institutional format. Reflecting its inherently hybrid Filipino roots in Spanish, Chinese and Malay cultures, NAATCO’s original goal was to embrace European culture as equally intrinsic to the Asian American experience, presenting European and American classics as written, in alternative settings and cast with Asian American actors. Recently, NAATCO has commissioned Asian American playwrights to adapt European and American classics.

Theatre Mu was founded in 1992 by Rick Shiomi, Dong-Il Lee, Martha Johnson and Diane Espaldon, with the assumption that they would replicate existing theatre models in producing Asian American-themed work. Several years later, the team realized that these models would not work for Theatre Mu. Southeast Asian immigrants in the Twin Cities tended to be more interested in traditional forms than in Western theatre, leading Theatre Mu to work which fuses traditional forms and Western dramaturgy. Playwright Shiomi’s

background in taiko prompted the theatre's transformation to Theatre Mu and Taiko, a transitional step en route to further evolution as Mu Performing Arts.

Second Generation (2G) was founded in 1997 by the Taiwan-born actor Welly Yang with the goal of creating professional opportunities for Asian American actors. 2G adopted the quintessentially American musical theatre format to tell Asian American stories. Its producing model capitalizes on U.S.-Asia partnerships, departs from the institutional model of the "traditional" resident theatre and has adopted the entrepreneurial production process of the work that interests the company.

Latino Theatre

Rosalba Rolon (Artistic Director, Pregones Theater, Bronx) and Abel Lopez (Associate Producing Director, GALA Hispanic Theatre, Washington, D.C.) led the presentation of the Latino theatre heritage in the United States. Latinos are perceived to be geographically situated largely according to migration patterns, but it is important to note that regional concentrations also reflect the history of borders where indigenous populations lived before European colonization—Incas, Mayans, Yaquis whose dynasties existed at the same time as parallel European royal families. The melding of indigenous and colonizing cultures formed a *mestizo* hybrid, which later incorporated African and Asian influences as well.

1492 was important, not only for European exploration, but also for the expulsion of Jews and Arabs from Spain, further promoting the seeding of Spanish culture around the globe. As Lopez eloquently expresses it, "We welcome those who have followed and have enriched our culture. Within the Spanish tongue is the commonality of those various cultures, recognizing that within our culture, we reflect great diversity."

Indeed, a focal commonality among Latino theatres is the Spanish language, whether the theatre chooses to perform in English, Spanish or a hybrid Spanglish. The need to use the Spanish language is not only a political statement, but an act of cultural retention. English may be the language of commerce and American social interaction, but Spanish is at the root of Latino culture.

A basic concern among many Latino theatres is that the formal structure of not-for-profit theatre does not recognize or acknowledge the cultural forms that continue to exist in Latino communities. The need for arts and culture—not just theatre, but movement, song, rhythm—is important to community life, but the prevailing form and structure of not-for-profit institutions sits less comfortably within this sphere.

The oldest continuously operating not-for-profit Latino theatre company is El Teatro Campesino, founded in 1965 in San Juan Bautista, California by Luis Valdez, followed by Teatro Esperanza in 1971 in Santa Barbara, both reflecting the need to address socially relevant themes and issues. In New York City, René Buch and Gilberto Zaldivar founded Repertorio Español in 1968 to present the best of Latin American, Spanish and Hispanic American theatre in "distinctive, quality productions." Along with Max Ferra's

INTAR, the Puerto Rican Traveling Theatre founded by Miriam Colon in the East, and Teatro Milagro, established by José Eduardo González and Dañel Malán in the West, these theatres represent the first generation of not-for-profit Latino theatre institutions. More theatres cropped up in the East, Southwest and Southeast, ranging widely in form, purpose and nationality. In the East, the Young Lords movement embraced an African American identity and the Civil Rights movement.

Latino cultural organizations tend to be not so much community-based, as community-centered. The earliest Latino theatres in the United States were founded in response to a felt need for a public space within the community, a cultural center presenting music, dance and theatre, not governed by market appeal, but acknowledging the need for public participation, community goals, and transference of cultural history. It would be a generation before these cultural centers would be experienced only as theatres.

Several performance traditions characterize the Latino theatre. Some theatres adopt a more curatorial approach along the European theatre model. Others embrace an ensemble structure, and the tradition of collective creation is an integral part of that history. What may seem chaotic to external onlookers is very much a strength of this process. This ensemble tradition is a powerful reflection of Latino culture, which includes an historic emphasis on the centrality of family life, but it presents a challenge to institutional norms today. Younger artists are often unwilling to make a long-term commitment to the ensemble process, and funding programs aimed at artists' residencies are not particularly responsive to the needs of organizations whose ensemble artists develop work over time without the involvement of non-company members.

Festivals are another Latino performing arts tradition. TENAZ (Teatros Nacionales de Aztlan) International Festival, hosted by the Guadalupe Cultural Arts Center, began in 1970 and is one of the oldest theatre festivals in the Southwest. Young artists have been spawned in these festival settings, stimulated by the ferment and bustle of many companies coming together to see each other's work.

Three catalytic theatre events have had an indelible impact on the internal and external evolution of Latino theatre: *The Ox-Cart*, produced by Miriam Colon (founder of the Puerto Rican Traveling Theatre) with assistance from Gilberto Zaldivar (co-founder of Repertorio Espanol), was the first Latino production that reached outside the immediate community and paved the way for Latino theatre to come; *West Side Story* brought a view of Latino culture to the Broadway stage for the first time, albeit written by non-Latinos; and *Zoot Suit* by Luis Valdez was the first production by a Latino artist on Broadway. Decades later, the 2003 Pulitzer Prize in Drama was awarded to Cuban-born Nilo Cruz for *Anna in the Tropics*, which has been produced in several resident theatres and on Broadway. These landmarks reflect the evolution of relationships between the Latino theatre community and "mainstream" cultural structures that lie at the heart of the conference discussions of Latino theatres in particular and theatres of color in general.

III. HOW IS YOUR HEALTH?—CAPITALIZATION & INFRASTRUCTURE

“How do we ensure institutional health so we are not as fragile at age 25 as we were in our second year?”

“There is general acknowledgment of our artistic differences as ethnic theatres, but is it reasonable to suppose that uniform management priorities will suit us all? Perhaps our inner beings are culturally in conflict with a corporate management template.”

Since 1998, Zannie Giraud Voss, associate professor and Producing Director of Theater Previews at Duke, has analyzed TCG's Fiscal Surveys and has co-authored *Theatre Facts*. In preparation for this conference, TCG asked Voss to survey and analyze the 21 theatres of color comprising the conference participants. 19 theatres responded (Sample Group), and were compared both individually and as a group to the universe of TCG Group 1 (budgets of \$499K and less) and Group 2 (budgets of \$500K-\$1M) theatres that would be financial peers in the TCG Fiscal Survey universe of 190 respondents in 2002. Three of 19 theatres in the Sample Group would be in TCG's Group 3 by virtue of their budget size, but their statistics tend to track the other theatres in the Sample Group and were, therefore, blended into the overall findings. Another key feature of this analysis was to compare data among the Sample Group theatres according to ethnicity, i.e., African American, Asian American and Latino. Voss characterized the data she gathered as “telling your story with numbers.”

FINDINGS - Productivity: On the positive side of the story, the Sample Group was extremely productive. Attendance at these 19 theatres in 2002 totaled almost 202,000, with 1,489 performances of 110 productions. Moreover, nearly 435,000 people were served by 78 education and outreach programs—representing enormous productivity and reach. The aggregate earnings of this group was \$3,640,114, with contributions of \$8,092,662, for total earned and contributed income of \$11,732,778 against expenses of \$11,520,727, resulting in a cumulative positive change in unrestricted net assets (CUNA) of \$212,051. This activity also resulted in employment for a total of 1,097 people.

FINANCIAL SUMMARY

Sample Group: 19 theatres of color
Group I: Theatres with budgets under \$500,000
Group II: Theatres with budgets between \$500,000 and \$1 million
CUNA: Changes in unrestricted net assets as a % of expenses

	Sample	Group I	Group II
Earned \$ as a % of total income	31%	43%	48%
Contributed \$ as a % of total income	69%	57%	52%
Change in CUNA	1.8%	-3.1%	1.4%

31% of total income from these 19 theatres was earned, as compared to 43% in Group 1 theatres and 48% for Group 2 theatres. 69% of total income was, therefore, contributed among the 19 theatres of color, as compared to 57% and 52% contributed earnings in Group 1 and 2 theatres respectively. Further the 19-theatre Sample Group had a total positive CUNA of 1.8% of expenses, as compared to a negative CUNA of -3.1% in Group 1 and 1.4% in Group 2.

Observations - Productivity: On the plus side, then, theatres of color could be viewed as being comparatively more effective in raising money from contributed sources, and less successful in generating earned revenue. One might also cite overall success in managing expenses in relationship to income as demonstrated in the positive CUNA. But, the low percentage of earned income was troubling insofar as it underran the average even for smaller theatres. What is a viable balance between earned and contributed revenue for a theatre of color and what are the barriers to achieving this balance?

Another area of concern is the fact that dollars in and dollars out were essentially equal, a virtual revolving door which does not allow for growth or stability during a downturn or a cash flow crunch. Many theatres have managed to balance their budgets by eliminating services and/or staff, reducing programming and compensation, and postponing what might be much needed purchases and improvements or filling vacant positions.

FINDINGS – Earned Income: In analyzing earned and contributed income, the Sample Group as a whole tracked Group 1 more closely than Group 2:

EARNED INCOME COMPARISON			
<u>REVENUE SOURCE</u>	<u>Sample</u>	<u>Group 1</u>	<u>Group 2</u>
Single Ticket Sales	53%	56%	41%
Subscription Sales	14%	13%	18%
Presenting Fees, Royalties, Other Earned	11%	9%	17%
Concessions, Ads, Rentals	10%	7%	9%
Education/Outreach	12%	14%	11%
Endowment Earnings	0%	1%	3%
Capital Gains/Interest	0%	0%	1%

Observations – Earned Income: The following trends were notable:

- As theatres become larger, they rely less on single ticket income as a percentage of earned revenue, and increasingly on other forms of earned revenue, including: subscription, presenting fees, royalties, and the beginnings of endowment earnings. By contrast, theatres of color relied heavily on single tickets for over half of earned income with other forms of income at a more static level.
- There was no endowment, interest or capital gains income capacity among the Sample Group of theatres of color whereas that capacity appeared among Group 1 and 2 theatres. This represents an area of long-range opportunity.

- Lower subscription sales corroborated traditional single ticket buying patterns among theatres of color.

FINDINGS – Earned Income within Sample: Earned income sources differed significantly among the ethnic groups in the Sample Group.

EARNED INCOME COMPARISON				
SOURCE OF REVENUE	Sample	AfAm	Asian	Latino
Single Ticket Sales	53%	56%	45%	53%
Subscription Sales	14%	22%	9%	4%
Presenting Fees, Royalties, Production Income, Other Earned	11%	5%	18%	16%
Concessions, Ads, Rentals	10%	6%	3%	21%
Education/Outreach	12%	11%	24%	6%
Interest, Endowment Earnings, Capital Gains	0%	0%	1%	0%

Observations – Earned Income within Sample:

- Asian American theatres realized only 45% of earned revenue from single ticket sales, as compared to 56% and 53% among African American and Latino theatres respectively. By contrast, 22% of African American ticket revenue was from subscription sales vs. 9% and 4% from Asian American and Latino theatres respectively.
- Group sales revenue figured prominently in overall ticket sales among some theatres of color. Asian American theatres are only beginning to capitalize on group sales whereas African American theatres rely more heavily on this revenue stream. Some Latino theatres are beginning to use group sales to reach university markets.
- On the other hand, Asian American and Latino theatres earned 18% and 16% of earned revenues respectively from presenting fees, royalties, and other production income, e.g., touring, while African American theatres earned only 5% from similar sources.
- Latino theatres led in concession, ad and rental income at 21% of earned revenue while these sources add only 6% and 3% respectively of African American and Asian American theatre revenue. This may well be attributable to the fact that more Latino theatres in the Sample Group control their venues, in comparison to African American and Asian American theatres.
- Asian American theatres demonstrated the largest percentage (24%) in education and outreach revenue, as compared to 11% for African Americans and 6% for Latinos, though in the case of Latino theatres, it is difficult to differentiate between touring and outreach in assigning revenue allocations.
- In all cases, as indicated earlier, interest, endowment earnings and capital gains were at or near 0.

FINDINGS - Expenses: A comparison of expenses between the Sample Group and all Group 1 and 2 theatres provided many parallels, with notable differences among Sample Group respondents. It is important to remember that in making these comparisons, the focus was not on how the expenses *should* look, but rather how they *do* look. Further, these figures describe what choices theatres make in prioritizing expenses, but not *why* they make those choices. There is an erroneous notion that “all things being equal,” this is how theatres choose to spend their money, but all things are not equal, resulting in different strategies at different institutions, in different communities—both in the geographic and ethnic sense.

EXPENSE COMPARISON			
EXPENSE CATEGORY	Sample	Group 1	Group 2
Artist Payroll	26%	32%	31%
Production Payroll	8%	7%	8%
Administrative Payroll	18%	16%	19%
Artistic & Production	14%	13%	12%
Facility	10%	12%	12%
Marketing	11%	9%	7%
Development	5%	3%	3%
Concessions, Box Office, Education, Front of House, General Management	10%	8%	8%

Observations - Expenses: Sample Group as compared to Group 1 and 2 theatres:

- The artistic payroll in the Sample Group constituted 26% of the budget as compared to 32% in Group 1 and 31% in Group 2.
- Other compensation areas: administrative, box office, education, general management, production, front of house, closely tracked the Group 1 and 2 averages with 1 or 2% variances that were difficult to differentiate. It may be significant to note, however, that administrative expenses in Group 1 theatres as a whole were at 16% vs. 32% for artistic payroll, as compared to 18% administrative and 26% artistic in the Sample Group.
- In general, the Sample Group spent 10% on facility costs vs. 12% in both Group 1 and Group 2 theatres.
- Marketing and development costs in the Sample Group totaled 16%, as compared to 12% and 10% respectively in Groups 1 and 2.

FINDINGS – Expenses within Sample: Among the ethnic groups, expense ratios were quite divergent:

EXPENSE COMPARISONS BY ETHNIC GROUP				
EXPENSE CATEGORY	Sample	AfAm	Asian	Latino
Artist Payroll	26%	25%	26%	26%
Production Payroll	8%	9%	8%	7%
Administrative Payroll	18%	22%	12%	16%
Artistic & Production	14%	13%	16%	13%
Facility	10%	7%	13%	11%
Marketing	11%	13%	9%	11%
Development	5%	4%	8%	5%
Concessions, Box Office, Education, Front of House, General Management	8%	7%	8%	11%

Observations – Expenses within Sample: While some expense areas were almost identical as a percentage of budget, others differed substantially:

- Artist payrolls were relatively similar at 25-26%, and artistic/production expenses hovered between 13-16%.
- Administrative expenses, while averaging 18% of total expenses, differed considerably between 22% for African American theatres to 12% for Asian American, with Latino administrative payrolls at 16%.
- Facility costs averaging 10%, swung between 7% for African Americans and 13% for Asian Americans with Latinos at 11%.
- Marketing ranged as well, from 13% for African Americans, 11% for Latinos and 9% for Asian Americans. By contrast, development expenses went from 8% among Asian Americans to 4% among African Americans, with Latinos again occupying the middle road at 5%.

FINDINGS – Contributed Income: A breakdown of contributed income compared the Sample Group to Groups 1 and 2, as well as to each other:

CONTRIBUTED INCOME COMPARISON			
CONTRIBUTED SOURCE	Sample	Group 1	Group 2
Federal	4%	2%	3%
State	8%	9%	8%
Local	12%	6%	6%
Foundation	29%	32%	29%
Corporate	17%	6%	9%
Trustees	2%	7%	7%
Other Individuals	6%	17%	16%
Fundraisers, United Fund, In-kind, Other	22%	21%	22%

Observations – Contributed Income: As previously cited, contributed income constituted a much larger percentage of the Sample Group's income in comparison to all

Group 1 and Group 2 theatres—69% versus 57% and 52% respectively. Within the contributed income distribution:

- Federal and state income was relatively similar across the comparison, but local public dollars to the Sample Group were twice that to Group 1 and 2 theatres in general.
- Foundation contributions, while somewhat higher as a percentage of income to Group 1 theatres, were relatively level across the study.
- Corporate dollars were significantly higher to the Sample Group by a factor of more than 2, both as a percentage of contributed revenue, and in actual dollars (as demonstrated by an analysis of average dollars per theatre to the Sample Group as compared to average dollars per theatre to Group 2 theatres).
- Fundraisers, United Fund giving, in-kind support and other contributed income were similar across the comparison.
- Board and individual giving were significantly lower to the Sample Group, both in the number of trustees contributing and average size of trustee gift. (Interestingly, in a parallel analysis, the average gift size from other individuals was similar between the Sample Group and Group 2 theaters, but the number of donors to the average Sample Group theatre was less than half that of the average Group 2 theatre.)

FINDINGS – Contributed Income within Sample: Comparisons of contributed income by cultural group within the Sample Group revealed further unique attributes:

CONTRIBUTED INCOME COMPARISON BY ETHNIC GROUP				
CONTRIBUTED INCOME CATEGORY	Sample	AfAm	Asian	Latino
Federal	4%	2%	4%	5%
State	8%	8%	8%	9%
Local	12%	6%	5%	22%
Foundation	29%	33%	27%	25%
Corporate	17%	26%	10%	13%
Trustees	2%	2%	1%	2%
Other Individuals	6%	7%	14%	2%
Fundraisers, United Funds, In-kind, Other	22%	16%	31%	22%

Observations – Contributed Income within Sample: While the difference in the contributed income breakdown between the Sample Group and Group 1 and 2 theatres was primarily seen in the area of individual giving, there was a pronounced disparity among the different ethnic groups in this comparison.

- Federal dollars as a percentage of contributed income was less for African Americans than for Asian Americans and Latino, but state dollars as a percentage were very similar.
- In the case of local public dollars, however, Latino theatres received a much higher percentage of budget from this source.

- Foundation giving, was somewhat higher for African American and somewhat lower for Latino theatres, again as a percentage of the theatres' contributed income. While no ethnic group diverged widely from the average, the difference in reliance on foundations between African American and Latino theatres was noteworthy.
- Corporate giving as a percentage of budget was also variable, with African American theatres receiving a significantly higher percentage of contributed income from corporate sources.
- All ethnic groups demonstrated a very low level of reliance on board giving, but giving from other individuals varied considerably, with Asian American theatres more closely approaching the 16% level of all Group 2 theatres
- In the area of other contributed income, particularly fundraisers, the Sample Group seemed to track the Group 1 and 2 theatres in general, but within the Sample Group, Asian American theatres have been particularly reliant on this area of income at 31% of contributed income. (This data is significantly impacted by one theatre that raises as much as 20% of its entire budget in one major benefit each year.)
- It was noted that there are other Group 1 and 2 theatres that are in the midst of capital campaigns, and that TCG's 2002 *Theatre Facts* indicates marked growth in individual and board giving, though frequently in connection with capital or endowment campaigns. That this sector of support was absent in the Sample Group is a worrisome factor in working toward long-term stability. The low level of individual giving bears a direct relationship to the potential for success in a major gifts campaign; it is unreasonable to anticipate a large gift from a donor who has not been helping the organization over an extended period of time.

Working Capital: With this data in mind and referencing Cool Spring Analytics, Voss led a discussion about working capital, a critical factor in measuring financial health and “a fundamental building block essential for organizational growth and the ability to take risks and to meet financial commitments in a timely fashion.” Working capital is quite simply “what resources you have readily available to pay for operations.” A healthy organization should have at least three months of working capital in place. Two other factors are measures of financial health or dysfunction: debt, i.e., short and long term obligations and the ability to repay them; and invested capital, i.e., long term investments generating interest income which can be directed toward operations.

Working capital is measured by taking “total unrestricted net assets” from the theatre’s audited balance sheet, and subtracting “building, equipment, depreciation” (calculated by adding building, equipment less depreciation) and further subtracting unrestricted endowment. Divide the working capital by total expenses to arrive at a working capital ratio. If the theatre’s working capital is negative, the institution is undoubtedly experiencing cash flow stress or financial crisis. If working capital is positive, health is determined by the number of months the organization could exist on working capital alone.

The Sample Group's working capital average is a negative amount, -\$49,460 against an average budget size of \$606,354, resulting in an average working capital ratio of -8%. Understanding the value of a positive working capital is key, though it is understandably difficult to imagine how such a resource might be amassed when most of the organizations are struggling with day-to-day survival. Even those theatres that have participated in donor-driven working capital programs commented that they had been short-sighted in not pushing during the stronger financial years to build beyond the donor-mandated minimums. Today's economic realities—delayed or reduced funding due to severe budget cuts in public and private funding agencies, the economic downturn, and the reticence of the ticket-buying public—mean that even promised revenue is often delayed in arriving, and fundraising needs are increasingly difficult to fulfill. In this climate, discussion of endowments, investments and securities seems remote and at the same time, essential to long-term fiscal and organizational stability.

FUNDING AND FINANCIAL HEALTH

Based on the extended discussion around determining and achieving stability, five breakout groups worked to identify the overarching challenges that all theatres felt they share in achieving financial health. Their 21 recommendations can be distilled into five areas:

- Move beyond a hand-to-mouth existence; build a working capital reserve and improve the working capital ratio.
- Increase individual giving both from the board and other individuals, while developing a culturally sensitive approach to donor development;
- Improve single tickets sales while identifying other models for earned revenue that reflect the theatre's mission and capitalize on its strengths;
- Define a healthy relationship between earned and contributed income; clarify the relationship between marketing and development to maximize their effectiveness;
- Understand and evaluate the organization's potential for growth.

Secondary needs toward addressing these five large goals are:

- Understanding how to utilize financial data once it is collected;
- Determining the optimal percentage return on marketing dollars;
- Budgeting for increased income vs. the expense to raise it;
- Increasing the level of foundation and corporate giving.

A protracted discussion about contributed income focused on individual and board giving. Sample Group theatres tend to serve audiences that are from low and moderate-income families, whose volunteerism may be high, but not matched by financial resources. Further, communities of color, while demonstrating significant histories of giving, are not specifically oriented toward contributing to the arts, though other beneficiaries—the church, education, disaster-related fund drives—are common. In fact, many cultural organizations tend not to ask for individual contributions, even when there have been no specific barriers to asking.

The low level of individual support is of concern not only because increases are essential to growth and sustainability, but also because institutional donors frequently consider the level of individual and board support to be a barometer of institutional vitality and community support. Many theatres feel, however, that an “off the shelf” model of fundraising, and even of financial health, seems culturally inappropriate and financially unrealistic.

In the area of board development and giving, theatres agreed that they have historically not been clear about what is expected from board members. In lieu of cash contributions, Board members do provide specific expertise—accounting, real estate, marketing, entertainment—or access to corporate and/or other individual contributions, but there has been no effective way to calibrate the non-cash benefits that board members provide. There was broad support for the idea of a working board with a passion for the theatre’s work, rather than board members chosen for their financial capabilities. Vigorous defense of current board composition cited the inability of surveys to properly quantify the kinds of resources that a board member might provide, e.g., if a board member facilitates a meeting with a Nike representative that results in a grant, does that grant appear as a corporate or a trustee contribution?

Ultimately, the goal is more than a balanced budget. How do theatres move beyond equating survival with success, to achieve genuine financial health and stability? A key part of that success might be turning the artists, audience, community, and even donors, into shareholders or stakeholders, so that they become invested in the organization as ticket buyers, donors, in-kind service providers and overall kindred spirits. One conferee described her experience working for the Girl Scouts, where all employees and parents are donors as well as participants. How many theatre employees feel compelled to be donors, even at the most modest level? The Girl Scouts’ goal is to motivate participants and staff to feel personally as well as professionally engaged in the health and work of the organization. The idea of building shareholders—or stakeholders—goes beyond fundraising to encouraging investment in the organization at every level: investment of time, energy, passion, commitment, and yes, money, to ensure its sustainability as a community resource.

IV. VESTING AND INVESTING— ARTICULATING CURRENT REALITIES

“It’s always something else, and the something else never ends.”

“If we don’t do it, who will?”

Recognizing that fiscal realities are inextricable from organizational stability, participants were asked to delve into the other realities that influence their ability to be successful as organizations. They also exchanged ideas about the ways their theatres have developed to cope with these realities.

An array of *external forces* impact theatres of color and their work:

- Lack of public awareness of the theatres’ unique cultural perspective;
- Dearth of critical writing and commentary to educate the general public about the work of theatres of color;
- Impact of inadequate or uninformed media coverage on public attitudes, private funders and educational institutions;
- Losing mature artistic talent and material to larger institutions;
- Larger institutions accorded credit for developing forms that were nurtured in theatres of color;
- Pressure to conform to external metrics of organizational success;
- Failure of funders to understand the unanticipated consequences of programs that assume specific models of leadership or management structure;
- Programs aimed at building diverse audiences that benefit the major institutions, sometimes at the expense of culturally-specific organizations.

Internal forces are also factors in the struggle for survival among of theatres of color.

- Learning how to articulate the theatres’ value as institutions, rather than taking that value for granted;
- Making a stronger case for the existence of theatres of color for their own sake, not simply as feeders to mainstream culture;
- Training artists, staff and audiences of color to feel vested in these organizations, and in doing so, to give back and to feel engaged, even after they have moved on;
- “The more successful we are in nurturing talent, the more we become victims of our success.”

Three broad areas for consideration were distilled from the “realities” discussion and mirror the topics originally identified by the Advisory Task Force:

- Why are theatres of color important, and why do we have to keep answering that question? – ARTISTIC ISSUES

- Investing in the next generation of theatre artists and audiences – EDUCATION AND TRAINING; DEVELOPMENT OF LEADERS, STAFF AND ARTISTS; BUILDING AUDIENCES
- Theatres of color in the public eye – MEDIA AND CRITICISM

ARTISTIC ISSUES

In many ways, “artistic process and the work” are what is right about theatres of color. The cultural histories, which launched the meeting, are potent reminders of what this sector has achieved and the unique impact of its aesthetics and artists. There are also many ways in which theatres of color share the fundamental concerns of the theatre community as a whole. Consequently, there was no attempt to be comprehensive in discussing concerns surrounding the artistic process except in two important areas: making the case for theatres of color and artistic collaborations.

Famous enough? Theatres of color feel that they are constantly called upon to justify their existence, to explain the why, what and how of their unique cultural perspectives. Neither the media, public and private funders, nor educational institutions that teach the history and literature of theatre adequately credit the quality of work and generative role played by theatres of color, as touched upon in the powerful heritage presentations that opened the convening. Michael Kaiser, President of the Kennedy Center, was cited as saying in the context of a recent workshop for culturally specific organizations, “You’re not famous enough;” the problem is not the quality of the work produced by theatres of color, but recognition for doing it.

The theatres feel that control of financial resources is centered in the dominant culture, allocated in a format that is pre-determined and that may not be sensitive to differing assumptions of leadership in ethnic communities. Some participants cited invitations to serve on selection panels or to recommend artists of color—to donors for awards or to other theatres—but note that their input is often absent in development of proposal guidelines, and when determining the criteria for selection. Theatres of color continue to feel marginalized in the process that defines the terms and sets the policies for support.

Even when issues of diversity and access are addressed head on, the diversification of the mainstream audience often seems to occur at the expense of theatres of color. Works by artists of color, particularly African Americans, have been extremely lucrative in “mainstream” venues, often topping per show revenue projections, but theatres of color rarely benefit from similar windfalls. Often, programs to increase access to work of excellence have been aimed at changing the audience demographic in mainstream institutions, while appearing to ignore the role historically played by theatres by, of and for those audiences.

Artistic Collaborations: Faced with institutional limitations and lacking sufficient public recognition for their artistic achievements, collaboration has become a critical strategy for theatres of color with both constructive and deleterious results. For their own

part, larger theatres and their audiences are interested—often with the encouragement of funding initiatives—in the artistic material, access to artists and audiences, and ultimately authenticity, which have been the critical advantage of theatres of color. There have been many productive collaborations, but more often theatres of color have felt that they are left holding the short end of the stick, either because of financial, artistic or perceptual imbalances of power. “Give and take is intrinsic in the business, but do we ever get beyond a minimum return on our investment, no matter how we play the game?”

The tension between “mainstream” theatres that partner with theatres of color is the classic dichotomy between large and small, haves and have nots, and sometimes a perceived differentiation of class as well. A different sort of “Golden Rule” seems to operate to the detriment of the small theatres in these relationships, i.e., “He who has the gold, rules.” Avoiding the “big house syndrome” becomes a key responsibility of all the partners in a collaborative relationship.

Mutual respect for the value that each partner brings to the table is a central element in successful partnerships. One conferee notes that “mainstream organizations have the institutional form and need, and they come to us because we have the content, so we need to be clear about the ground rules for sharing the content.” Sometimes, whether intentional or not, the sheer size of the larger partner tends to overshadow the generative role of the smaller, and efforts to clarify who did what may be obscured or overlooked, particularly by external audiences and the press.

Of course, theatres of color are interested in promoting the careers of their artists and the work that they have produced, but it is frustrating to be viewed simply as a feeder system or talent database, rather than as institutions equally engaged in the challenges and advancement of a cadre of artists and a body of work. One discussant cautioned against the marginalization inherent in being asked to comment only on issues of color.

What are the criteria for a successful collaboration? One theatre cited a prior working relationship as key to success. “The answer on collaborating is ‘no’ until we build that relationship.” Another experienced producer advises, “You have to know what you want and why you want it. And you have to clearly define the goals and mutual responsibilities, the ground rules.” Mutual respect, inclusion, shared authority have to be part of the upfront conversation. Some participants believe that there is nothing to be gained in collaborating with “mainstream” theatres, particularly when neither the Board, staff, nor audiences of those larger institutions demonstrate a commitment to ethnic artists and their work. One producer put it more bluntly, “I say no because I have nothing to gain. I’m not here just to legitimize your work.”

EDUCATION, TRAINING, PROFESSIONAL DEVELOPMENT AND AUDIENCES

Education programming priorities and expectations elicited intense and often impassioned discussion. For the most part, theatres were anxious to make the point that they put theatre production first, and that effective educational programming should be

designed to serve that goal in both the short- and long-term. But the reality is that this balancing act is not easily achieved. Discussion ranged widely and included: delivering arts-in-education programming directly to young people and schools; professional development for young artists and administrators; and utilizing educational programming to build the audiences of tomorrow. Many theatres emphasized their commitment to education as an integral part of their mission both to provide a fuller audience experience and for audience development.

Theatres whose programming targets adult audiences aim their educational programming at the college and university level. Several theatres have formed symbiotic relationships with academic institutions, providing services in exchange for space, or access to student marketing opportunities. Some theatres have developed apprenticeship programs with an eye to increasing awareness of jobs in theatre and creating an effective transition from academia to professional life. At the same time, other theatres are frustrated that they lack the resources to effectively make use of apprenticeship opportunities.

Education and Training: Theatres of color are almost all actively engaged in some form of education or training program. But even while they embrace this opportunity and responsibility, they report a serious tension between being true to the theatre's mission while accommodating the sometimes conflicting expectations of the education, funding and community partners. This pressure to deliver high quality services, whether in or after school, has created stress, even in the midst of success. External and internal challenges to successful programming are manifold. Donors, schools and community partners enable theatres to provide programming, but raise unanticipated consequences, such as:

- Temptation to chase educational funding that deflects the theatre from its core mission and values;
- Finding resources to turn successful pilot projects into permanent programs of the theatre after the initial funding period has been completed;
- Time-consuming effort to identify appropriate material for educational purposes, and in some cases, to translate it into English for use in schools; some theatres take as long as two years to prepare educational programs;
- Making it clear that artists in the schools are there as *artists*, not adjunct faculty;
- Pressure to provide educational services that conform with constantly shifting state education standards and that complement current classroom curriculum;
- Deflecting the assumption that a theatre of color is a de facto social service agency;
- Partnering from the outset to match the theatre's work with the course design, rather than expecting the theatre's work to chase curricular demands;
- Building in appropriate administrative overhead to compensate the theatre for its work in connecting artists and schools;
- Ensuring that educational programming is at the center of the mission and values of the theatre.

One participant summed it up, “If we don’t do it, who will? We have an education program, which is very much a part of our mission. It is about vesting the community and about audience development, which ultimately drives everything we do. . . . We were doing education programs before we had a mainstage, because we could do theatre for young audiences anywhere. We do education programs because it is the best way to build audiences for the future.”

Funding for educational activities was a charged topic. In the context of the financial survey, one participant noted that the low percentage of income generated by educational services among African American theatres reflects longstanding frustrations of dealing with in-school programming, where payment on contracted services can be very late in coming, often long after the service has been provided. Another noted that so many school board budgets have been cut that theatres cannot rely on timely payment and that erratic school budgeting prevents theatres from planning effectively into the future. At least two theatres mentioned that participation in Annenberg initiatives filled crucial gaps in education revenue. Another theatre reported that it prefers to work directly with individual schools, rather than with school systems or boards, to facilitate timely payment.

In Washington, D.C. and other cities, theatres believe that contributed income tends to be more readily available for outreach, i.e., after-school programs, and while these resources can counterbalance the disappearance of in-school service budgets, a new problem arises in the lack of physical space where theatres can offer educational services. Whether for educational activities or production, the availability and accessibility of space for use by theatres is an ongoing problem.

As always, theatres have been highly resourceful in adapting to financial constraints. Many cities—Portland, St. Louis and Houston among them—are experiencing severe education budget cuts and are struggling to maintain the level of education services through contributed income rather than earning fees for services. One strategy is building partnerships with educational and other service providers to capitalize on institutional core competencies:

- One theatre applies for funding for free after-school arts programs in tandem with the school receiving the services, with the caveat that any spaces that are not filled by students from that school might be offered to fee-paying students from other schools;
- A theatre which produces material for adult audiences, has partnered with a Parenting and Prevention Program aimed at building self-esteem for young women;
- Another theatre, uncomfortable with bringing truncated versions of theatre to schools, is teaming with a poetry program to mutual benefit;
- Some theatres have developed shared educational programming with social service providers, at the same time cultivating potential new sectors of theatergoers;

- Another theatre believes that teacher training makes more sense than delivering educational services directly to students; however, sustainability for teacher training programs, once a curriculum has been successfully formalized, is the biggest challenge.

Financial constraints have resulted in creative fundraising and cost-cutting ideas:

- One theatre has been successful in raising support from individuals to continue educational services to donor-designated public schools, resulting in 25 new directed contributions;
- In conjunction with its production of *The Gospel at Colonus*, one theatre worked with a coalition of black clergy to ask congregants to add \$15 to their ticket purchase to be dedicated to the theatre's educational programming;
- In a cost-cutting effort, another theatre is developing school programming in a storytelling rather than performance format, to utilize one artist rather than three, thereby reducing cost to the school while increasing revenue to the theatre.

Professional development issues generally took a back seat to financial concerns during the convening, with the exception of staff training and retention, which is related to financial stability. On the artistic side, there was extended discussion around ensuring the “loyalty” of artists to theatres of color where they cut their professional teeth, after these artists have gone on to achieve a level of recognition. The Steppenwolf company was cited as a model for the idea of ongoing reinvestment of senior artists when their careers permit.

Anecdotal accounts of seminal artistic influences point again and again to the importance of a mentor in the life of a developing talent, a senior artist who sees the glint of promise in a writer, an actor, a director, and simply says, “Come with me and I’ll help you.” Maria Irene Fornes, for example, was cited as having mentored so many young writers who have achieved success today. The theatre’s role, in this case INTAR, in providing Fornes with the time and space to generate the collective ferment that breeds young talent, is probably one of the greatest resources an institution can provide.

But cultivating talent is an art, not a science. Stories of missed opportunities are equally frequent: plays dismissed as unproduceable that go on to major commercial success; seemingly untutored actors who have the drive and versatility to succeed; writers from other media who ultimately find a home in theatre.

Here again the tension was palpable between the responsibility/obligation/desire of theatres of color to nurture the theatre leaders of tomorrow—whether artists or administrators—and the recurring reality of losing mature talent to larger, more visible roles and institutions. As much as theatres take pride in the success of the artists and theatre workers that they have trained, they also regret the time and resources dissipated in nurturing talented people who then capitalize on their training in other settings.

Rather than resist or resent the defection of artists to larger theatres or film, some theatres have been able to turn this reality into a revenue-generating opportunity. In Los Angeles, the high demand for actors' workshops motivated one theatre to provide professional development for young artists, with a capacity enrollment of 200 adult students. These classes provide the dual benefit of an earned income stream for the theater, and a talent pool that has the potential to grow with the theatre and to build a vested relationship over time. The stronger the theatre, the more apt it will be to be a force for change. As one theatre manager put it, "We must strengthen our institutions to take on the responsibility of developing and training voices of color to tell our stories well." Another theatre actively tracks the progress of "alums" to encourage them to continue their relationship with the theatre and to build the sense of a family of artists.

Some training programs have arisen in direct response to institutional needs. A Latino theatre was having difficulty identifying qualified technical personnel in the community. Consequently, they designed and found funding for a two-year pilot program to train young technicians; they hope to identify the resources to continue the program with the goal of making the program a permanent feature of the company. Another theatre offers a full-scale acting internship with its own performing season and audiences; parallel teenage technical and administrative training programs provide additional support to the professional staff, and expose young people of color to the full range of careers in the theatre. A well-managed internship program can provide potential young professionals with an invaluable bridge from academia to life in the theatre, at the same time, building an audience for the theatre.

Succession planning is a delicate subject, because so many leading institutions are approaching 25th, 30th and 35th anniversaries with visionary founders still very much at the helm. The basic concern is "succession and retirement with dignity"; and the ultimate founders' question is, "Who is going to do this work when we're gone?" Some theatres are deeply committed to planning for the future and are partnering with nearby graduate programs to identify and train talented young administrators with a stated interest in culturally-specific organizations, whether those students are of color themselves. The goal is to design a program that will be mutually beneficial to the theatre and the graduate school.

Theatres acknowledge the importance of distinguishing between succession planning and leadership transition. Leadership transition is the process of handing the reins from an existing leader to his/her identified successor. One skeptical theatre leader observed, "I don't know any institution that had a successor planned that the board didn't fire in a year." Succession planning, by contrast, is about preparedness to continue institutional movement forward, without dependence on a single person. "Succession planning says, 'Minus this human being, how do we ensure that the important qualities of the institution remain in place, when someone who doesn't have the same vision, goals, work style, whatever, is appointed.'" It is an important exercise, whether faced with imminent succession, "to consider the qualities of the current leader and the priorities that we would look for in a successor."

In the area of staff development, theatres discussed strategies for information-sharing and assessment within the theatre staff. “We need a chance to lift our head and get the lay of the land; to combat the danger of over-internalization and isolation.” One theatre uses an internal “annual report” that serves as a kind of departmental and procedural audit, not only as a mechanism for internal review, but also as a training handbook in the event of a leadership change. Another urges planning both as a succession tool and for day-to-day operations.

Audience development is finally at the heart of many education and outreach initiatives.

Though some theatres fear that educational programming diverts them from their core mission, others feel their educational programming is absolutely central to their goals. “It is about vesting the community and about audience development, which ultimately drives everything we do.” Another articulated the conundrum of too few people spread over too many activities, “I have a tension between staffing educational initiatives and the fact that young people are our audience of the future, and how will they know we’re here, if we’re not actively involved in the educational process.”

One theatre draws a direct relationship between educational programming and audience development by offering a free season ticket to any student in its summer program whose parent purchases a season ticket for the coming year. Summer program student performances draw audiences of supportive family and friends, many of whom have never attended the theatre. Whether they go on to become season ticket holders or single ticket purchasers, the experience gets parents involved in the institution and furthers the sense of community investment. As so many cultural organizations acknowledge, investing in arts education is an investment in the audience of tomorrow.

MEDIA AND CRITICISM

Discussion in this area revolved around two considerations: how can the media—print, radio, television, the Internet—best be utilized to market the work of theatres of color; and how does media-based criticism help or hinder the theatres’ work?

Marketing expenses (including but not limited to use of media) averaged somewhat higher for theatres of color, in comparison to the average for Group 1 and 2 theatres. Within the Sample Group, these costs were somewhat higher for Latino theatres. Marketing and media concerns were often conflated. One Latino theatre felt that its marketing costs reflected the practical necessity of marketing in two languages, both in printed materials and in English and Spanish language publications.

The different forms of media play a central role in what theatres view to be their potential for success. Advertising in traditional media seems to validate the theatres’ work to potential audiences. Print lags well behind radio, and especially television, in eliciting buyer response, though theatres of color can rarely afford the volume of media advertising that would make a difference in ticket sales. While media—whether print, radio or television—is seen as an important avenue for public information, there is a vast

divide between what theatres perceive to be their needs and what they can afford. While television is viewed as the most potent form of advertising, the cost of television promotion is prohibitively out of reach for all but the very largest theatres, even in the commercial sector. One theatre has formed an invaluable partnership with a local cable station, which promotes its productions and provides other useful in-kind services.

Some theatres feel that radio is the most cost-effective medium, especially in communities of color. One theatre observes that marketing appropriate productions on Christian or gospel stations achieves the highest return on radio advertising dollars. Print advertising, while important to artists and for institutional credibility, is considered much less cost-effective. Relationship-building can enhance effective use of media, whether by connecting with a radio announcer who helps with PSA's or with a journalist who successfully pitches or places feature stories.

On the Internet, several theatres have been successful with on-line "blasts." They believe that in the face of prohibitive media prices, the Internet provides the most cost-effective way to attract new audiences. By contrast, direct mail seems to work best to bring back the core audience. All theatres in the Sample Group utilize some form of Internet marketing.

A related concern among all theatres of color is the time-consuming effort of training younger staff members in marketing and development only to have them move on with their new professional skills. One approach to the staffing conundrum advocates the use of consultant services as an alternative to the process of training staff, though this can be costly as well. In addition, if single ticket income constitutes an unusually significant percentage of earned revenue according to the financial survey, then marketing expenses would be predictably higher, due to the higher cost of capturing a single ticket buyer as compared to retaining a subscriber.

Criticism is another area of ongoing frustration for theatres of color, though dissatisfaction with the critical establishment is age-old and industry-wide. Many comment that the press seems neither well-informed about nor interested in the cultural underpinnings of the work under review. In New York City, several Spanish language papers are perceived to be more interested in covering cultural activities in the countries of origin, rather than cultural activities of Latino theatres in the United States. There is also the concern that theatres of color, particularly those with a community-centered mission, tend to be covered under community affairs rather than arts, implying that their work is considered less artistically rigorous.

Theatres benefit occasionally from reviews and feature articles that boost ticket sales, but most ethnic theatres feel that reviewers, if they cover their work at all, attend too late in the run to have a positive impact on ticket revenue. In Manhattan in particular, theatres believe that the only review that will directly impact box office is *The New York Times*, where a rave means instant box office activity, and anything less spells box office disaster. Many theatres of color feel that they are last on the list for critical coverage, so that their work is often not seen and consequently fails to be considered for seasonal

theatre awards. African American theatres in New York City, St. Louis and elsewhere have established their own awards for African American theatres and artists—Audelco Awards in New York, and the Woodie Awards in St. Louis—to ensure that the work of their artists receives well-deserved recognition.

Some theatres have successfully engaged an external press agent in order to capitalize on the agent's prior relationship with the media, hopefully ensuring more feature coverage and better attendance by critics. Another theatre has successfully built a relationship with the Asian American Journalists Association, making sure that its members have access to regular information about the theatre's activity and are invited to productions. Similarly, other theatres of color have hosted journalists of color convening in their communities.

Keeping the press well-informed is an important responsibility of the theatre community, but there is concern as well about journalism training that fails to properly prepare future editors and critics to understand the roots of culturally-specific work. The Jerome Foundation's program for young critics in the Twin Cities and New York, and Columbia's National Arts Journalism Program were cited for their positive impact, but another strategy might be to approach other journalism programs, e.g., the Minority Journalism Program at Wayne State University, to consider theatre and/or arts criticism as a curricular offering to change the complexion of the critical establishment for the future.

V. MORE THAN MERE SURVIVAL— STRATEGIES FOR THE FUTURE

“Cast your buckets where you are.”(Booker T. Washington)

“I want to prove that there is a place for ethnic theatres; we have to prevent them from being swallowed into an environment where fewer, larger organizations deliver a lot of different services. We have to insist on institutional uniqueness and an infrastructure strong enough to weather economic changes.”

Throughout the conference, participants noted the importance of the opportunity to talk on an equal footing with peers who have shared goals and similar challenges. As one conferee noted, “I feel a comfort level here that I haven’t felt at other conferences. Gathering is key to breaking isolation.” But they also shared the urgent need to move past exchange of information to tangible outcomes. Even among the fiscally healthiest, the sense of victimization and shortage of resources seems endemic and threatens to undermine the significant achievement and community respect these institutions have earned. The artistic history of theatres and artists of color is rich and deserves to be recognized. At the same time, the efforts over the years to buttress these institutions and their resources by internal and external means do not seem to have had the desired long-term effect. Where do we go next?

Theatres of color all understand that the roots of institutional health lie in the artistic and management priorities they set for themselves. That said, this meeting provided an opportunity to talk about external strategies that would make a positive difference. Some of the needs the theatres listed are already addressed in some measure by existing programs offered by TCG or other nonprofit service organizations at the local, regional or national level. In many cases, however, the small, over-taxed staffing structure of theatres of color makes it difficult or impossible to take advantage of all that TCG and other service organizations might have to offer. Theatres need help in finding appropriate services, keyed to this constituency, as differentiated from the TCG membership as a whole.

One theatre leader invoked Booker T. Washington by saying, “Cast your buckets where you are.” He continued, “I’m really trying to get us to a point where we can look at what do we want to do about it [the survival and health of theatres of color] and how do we become proactive?”

Funding: Taking a page from TCG’s experience in creating the New Generations program, participants hope that their candid discussions might lead to a structured funding program, dealing with issues that are unique to this sector of the theatre community. Such a program and its requirements should avoid a cookie-cutter approach to organizational structure and be sensitive to the importance of “sweat equity” in measuring the contributions of Board, staff and audience to the health of the organization.

Theatres of color express the need to define and work toward a more diversified and healthier mix of earned and contributed income. Not surprisingly, not-for-profits are most interested in unrestricted support, but no program of support can be perennial, and all donors—public, private, individual—want to know what their contributions are doing for the institution and/or the art form, particularly in these tough times.

In the spirit of information-sharing, theatres talked about the possibility of bringing foundation and corporate funders to the table with culturally-specific theatres for a candid discussion of mutual interests and concerns. And though the fiscal analysis indicates that theatres of color have been comparatively successful with corporate donors, there continues to be high interest in understanding the differing—and changing—expectations of corporations. Ultimately, what theatres want and feel they need most is a national pool of funding for theatres of color, including white rural and native theatres, to build capacity and to buttress the base of unrestricted support.

Perhaps the most evident gap in the financial health and growth for this sector of the theatre population is the absence of working capital and even the most nascent endowments. In this era of rock bottom interest rates, endowment earnings may seem paltry in comparison to the amount of effort involved in raising endowment support. But as the old saying goes, it takes money to make money. Resources alone do not guarantee artistic success, but the lack of resources can stress and derail the artistic process. Thanks to the work of several foundations, there is a growing base of data to demonstrate the direct benefit of building working capital, as well as evidence of the best approaches to achieving that goal.

The challenge for donors will be to decide whether resources allocated specifically to theatres of color will strengthen their capabilities, individually and as a sector, or further marginalize them and their needs. And the theatres must inevitably continue to ask and answer tough questions about the viability of the institutions they have built. In response to the long list of financial issues that must be confronted—the right balance of earned to contributed income; building working capital; the cost-benefit relationship of marketing to ticket sales; the balance between marketing and development; the question of growth; building individual giving; diversifying earned income—which priority will lead to the greatest gains?

Theatres say they need a roadmap, yet declare a “cultural conflict with a corporate management template.” In the swirl of day-to-day demands, what theatres may need most are individualized institutional assessments, not only for those organizations best positioned to compete for and use the resource, but for all theatres of color that want it. As one theatre noted, “When we talk about how we can afford to pay people a living wage, I don’t expect that anyone is going to just give it to us. It’s attention to underlying strategies that we can employ; attention to financial grounding gives us a clue as to where we have to go to reach our goals.”

Technical assistance: Some theatres requested legal and/or accounting assistance to help with financial management strategies and contract negotiation, particularly in communities where Volunteer Lawyers for the Arts and Business Volunteers for the Arts services are less readily available. Another shared concern was advice about easy-to-use software to link development and marketing databases, box office and financial reports, and mailing lists, to achieve maximum utility, along with assistance in thinking through a cost-benefit analysis. Theatres confronting these issues for the first time are understandably daunted, not only by potential cost, but by the initial, unavoidable process of thinking through the “what do we need?” questions that necessarily precedes the “where do we get it?” solutions. At the same time, other theatres have already gone through the process of wading through this planning, some successfully and some less so; theatres at the beginning of this journey might benefit from the experiences of their colleagues. How can theatres share this information most effectively?

By contrast, other theatres, particularly those who have had more access to organizational development programs, were anxious to avoid yet another capacity-building program, programs that make heavy demands of meager administrative resources. Theatres feel poked and prodded, answering surveys, collecting data, while feeling that at the end of the day, they are uncertain as to how to use the data they have collected. With so many technical assistance programs available nationally and regionally, it seems more important to help steer theatres to the right resource, rather than attempting to create programs anew.

Marketing: Mutual support and collaboration among theatres of color could raise awareness of their work. Co-marketing efforts, such as one in New York City where Pan Asian Rep, INTAR and New Federal Theatre attempted to combine mailing lists and audiences to the benefit of all three theatres, rarely have the resources to continue after the first season. Any program that attempts to raise awareness across cultural groups will require a multi-year commitment to test it fairly.

Several theatres expressed the need for more feedback about how they are perceived by the public and their multiple audiences. Better understanding of audience perceptions would not be aimed at altering the artistic mission, rather to better target marketing and earned revenue strategies. Churches, universities and social groups were cited as valuable potential partners in space sharing, audience development and grappling with shared community issues.

TCG and the theatre community as a whole have considered the viability of a national advertising campaign to spark and build awareness of live theatre and the valuable distinction between live and electronic arts (a “Got Theatre?” campaign). Similarly, theatres of color suggest a marketing campaign that raises the profile of the importance of culturally-specific theatres to the fabric of community life. For example, an article in *American Theatre* showcasing the work of theatres of color might raise their collective profile as a force in the American theatre.

Communication: Commenting on a persistent sense of isolation from the theatre community and even from each other, participants pledged to include all the White Oak participants in their broadcast e-mail lists. Some acted on this promise immediately upon returning home, so that this theatre cohort might stay in touch with each other's activities. This report is peppered with dozens of creative strategies theatres have devised to solve their unique problems. Other ideas for information-sharing included: a periodic development/marketing managers' telephone roundtable, as is currently in place at TCG and through some regional service organizations; and continuation of the White Oak conversation on a regional basis, perhaps utilizing TCG's offices, at least for theatres in the Northeast, to meet on a quarterly basis.

On a broader level, participants want to build a dialogue with the academy, to engage universities in becoming documenters of the work of theatres of color, past and present. As one participant observed, "The victors write the history, but the vanquished sing the songs." Making the work of ethnic theatres and artists part of the standard curriculum of theatre and literary history is part of building the knowledge base and the validity of the work of theatres and artists of color. Not only is there a need to include ethnic theatres in the history of the art form, but there is an equally critical imperative to connect younger artists with theatre pioneers of the present and past that laid the groundwork for newer artistic forms.

Common threads/unique elements: The reference to sequoias offered at the beginning of the White Oak conference may be an apt metaphor for many reasons beyond the image of standing tall. Sequoias have also been endangered by overlogging, and today must be protected by public and private means or face extinction. It may be that protection of a resource requires external intervention to ensure continued health and well-being.

The dichotomy between theatres' unique experiences and shared problems—both stated and unspoken—was an underlying theme of the conference. Plainly, finances and funding are perceived to be at the heart of every institutional challenge, sometimes even altering core values and mission-centered programs. The fiscal analysis of the Sample Group was tremendously instructive, comparing survey findings to TCG's general Fiscal Survey data and among theatres of color in particular. The numbers speak to precarious organizational health. At the same time, there are persistent concerns about funding programs that posit a one-size-fits-all approach to institutional health.

Beyond cultural background, the Sample Group varies in many other ways: cultural background, institutional age (5 to 35 years), artistic mission, producing style, staff size, community particularities; the parameters are countless. Even within cultural groups, experiences differ. Ultimately, the questions remain, "What should our theatre do? What fits for us? Can we ever determine the "right balance of earned and contributed income"? What institutional structure makes the most sense for our work? As one theatre expressed it, "There is general acknowledgment of our artistic differences as ethnic theatres, but is it reasonable to suppose that uniform management priorities will suit us all?"

Most striking, as is frequently the case in both the not-for-profit and funding communities, is the intractability of problems—financial and programmatic, perceived and real. How can we learn from each other, not only theatre to theatre, but funder to funder? Perhaps most critically, as several theatres note, we need to bridge the divide of theatre and donor. For example, the Ford Foundation’s Working Capital Fund, established in 1995, produced an useful document, “Investing in Capital” describing its findings in 2001, with monitoring to continue through 2004. That study identified many of the same issues among cultural institutions of color, though its survey group was not limited to theatres. Four of the 19 theatres in the White Oak Sample Group participated in that program. Their experience provides the potential for evaluating impact and building on success, and at the very least, should inform any next steps, as should other funding initiatives aimed at cultural institutions of color and/or at mid-sized cultural institutions.

So many issues raised in this convening are not new; they have been identified, defined and addressed over the years in local, regional and national programs. Not only must theatres of color move to the next level—in size, in expertise, in maturity—but they must recognize their progress. This will only be possible if each puts a plan in place to mark that progress. One theatre summed it up with clarity, “A plan takes time, but it gives you a way to measure successes and note barriers to success that inform whether to continue or abandon, to measure progress or lack thereof. Some people say, ‘I don’t have time to do a plan,’ and I say, ‘You don’t have time *not* to plan.’”

VI. AMBASSADORS FOR THE THEATRE—INVESTING IN THE FUTURE

“The bottom line is that there are multiple perspectives and we need to see them all. If we don’t tell our stories through unfiltered voices, then there is a distorted perspective of the contributions we have made. We must be allowed to tell our stories, to write our stories, to interpret from our own cultural perspective.”

Twenty-one theatres of color converged on White Oak with questions that are perennial. Why are theatres of color important? Why must they continue to justify their distinctiveness, as well as their importance? What is their relationship to the larger theatre world? What is expected of artists of color who want experiences and opportunities in both theatres of color and “mainstream” theatres? What do artists owe in return to the theatres which nurture them? How can theatres of color diversify their donor base and build working capital?

Many feel strongly that the role of theatres of color is to provide an artistic experience that compels artists to return again and again, even when they have pursued other opportunities. As one participant put it, “I have to continue to produce artists who are able to do what they want to do. Sometimes people outgrow institutions and sometimes institutions outgrow people, and if they cannot realize the things they want to do, then it is time for them to move on.” But another theatre leader continued, “If their experience with you has been positive, then you have threads going out everywhere that come back to you, and sometimes those relationships lead to other opportunities. So it is on us to create the most positive opportunities for the artists and administrators that work with us so that they can come back as ambassadors for the experience they had with us. And when they leave, I want to celebrate them.”

This idea of institutional investment must extend to audience members and students as well. As theatres of color, what do we want our role to be in the larger market? People who feel invested in an organization, who are stakeholders in its health and success, who believe that they are better for the theatre’s existence, are people who will attend our events, volunteer time and expertise, and contribute. What can we do to ensure that more people—artists, sponsors, donors, foundations, and the audience—feel vested?

One conferee noted that Historically Black Colleges and Universities have not only survived, but thrived, because they continue to provide a unique and vital service, not only to African Americans, but to the community as a whole. HBCU’s provide the strength of their heritage and perspective, and their vitality provides a positive choice to discerning students. “When you join those organizations [e.g., HBCU’s, Girl Scouts], the contract between you and the organization is that they will be there for you every day. We tell our artists—don’t call us; we’ll call you. We don’t engage in relationships that really invite a return from the artist, except when we need their services or contributions.” The holistic goal is more than improving single ticket sales, or delivering after school programs, or fundraising. Rather, strategic interactions with artists, with young people, with audiences, with the ultimate goal of building relationships, can result in both anticipated and unanticipated returns on behalf of the theatre.

Survival in these challenging economic times may be admirable, but it is not sufficient. The longer-term goal is exactly that, to be able to take the long view, to defeat isolation with communication. One group of theatres pledged to convene a national conference of Asian American theatres in 2005. “We are inspired to think that shared interpretation will lead to shared collective practice.”

Passion, priority, commitment—these are the qualities that have ensured survival. Knowledge, artistry, planning, and more commitment—these are the skills we need to move forward, so that theatres of color are able to realize the principles on which they initially relied, i.e., an institution of, by and surrounded by its people. One theatre concluded, “When we were considering what we would do, I was convinced that the center of civilized society would be the arts. At the end of the day, if you can’t dream it’s worth nothing. I saw that what we were doing as a theatre had to connect with the community. What I worry about all the time is that I don’t think I’m pushing ourselves enough to be who we really are. We need to always be mindful of the qualities that are vital to who we are.”

One participant concluded, “It may be unfair that theatres of color must have a social agenda, but it is a social reality that like it or not, falls in our lap. We must be as aware of the conversations we have with each other, as well as the external ones; to talk only about external validation is to have missed the point.” Another responded, “To paraphrase Kennedy, ‘It is a nation’s art that is the measure of its civilization.’ I would like to be an instrument for change, or part of the mechanism for change. And the way I can effect that change is to be true to myself, and do what I know. I am a theatre artist, and an artist of color, and I must act from who I am.”