



SHAKESPEARE  
FESTIVAL  
ST. LOUIS

# STRATEGIC PLAN 2019 - 2022

## BACKGROUND

### PROCESS

In 2019, the Shakespeare Festival of St. Louis developed a 3-year strategic plan. The process had four phases:

Diagnostic – evaluating the Festival’s current situation and environment

Planning – establishing a shared vision for the Festival’s future

Action Planning – determining the specifics of how the Festival will achieve its goals

Commitment – committing to the plan and agreeing on a process for keeping score

Collaborative Strategies, Inc. facilitated the planning process. The strategic planning committee, chaired by Ed Macias, reviewed diagnostic findings and created the overarching planning deliverables – goals and strategic priorities. Then the team divided into small groups to work on project plans for the priorities. Additional staff and board members joined the action planning teams to promote an inclusive process and engage appropriate subject matter experts.

### PLANNING TEAM

The following individuals serve on the strategic planning committee:

Malvika Jhangiani	Linda Schulte
Mont Levy	Julie Sward
Ed Macias (Chair)	Pam Trapp
Tom Ridgely	Jennifer Wintzer

### DIAGNOSTIC FINDINGS

Collaborative Strategies organized an extensive diagnostic process that grounded the strategic plan in the reality of the Festival’s current situation. Quantitative analysis covered the organization’s financial results, program trends, and philanthropy statistics. Qualitative analysis included focus groups with staff, board and community stakeholders.

The full details of the diagnostic findings can be found in the planning committee’s notes and pre-read materials.

### PLANNING DELIVERABLES

#### MISSION

The Festival’s mission remains:

***To produce professional Shakespeare theatre, culminating in a free production in Forest Park, and to celebrate both Shakespeare’s language and the artists he has inspired.***

The planning committee recommends update the language - but not the intent - of the mission as time permits in FY19.

## A PICTURE OF SUCCESS IN 2022

To establish a direction for the strategic plan, the committee developed a series of goals that describe what “success” will look like for the Festival in 2022.

<p style="text-align: center;"><b><u>Our Desired Community Impact</u></b></p> <p>Among arts agencies, Shakespeare Festival of St. Louis is renowned for <b>reaching deep into the diversity of St. Louis’ community</b> (ages, races, geographies, socio-economic backgrounds) and enriching the region’s cultural vibrancy. The atmosphere and free admission of our showcase performance in Forest Park create a <b>uniquely approachable and accessible experience for all</b>. The informal setting of many of our performances creates <b>opportunities for community building</b> and learning from one another. We create <b>unique and powerful opportunities to participate in the art</b> while also developing and <b>supporting local artists</b>.</p>	
<p style="text-align: center;"><b><u>Program Goal</u></b></p> <ul style="list-style-type: none"> <li>• Recognized as delivering an even higher level of artistic excellence in all our programs.</li> <li>• Vibrant growth in participation in all our programs (in the park, streets, schools, ticketed shows, etc.) illustrates our status as a community treasure.</li> <li>• Using Shakespeare Glen to bring In the Works and In the Streets to a broader, bigger audience (and extend our summer calendar).</li> <li>• More fully influencing the region by creating more urban/rural collaboratives.</li> <li>• Celebrating and supporting new playwrights (especially local, e.g. Confluence Regional Writers Project)</li> <li>• Commissioning and producing new works.</li> <li>• Remaining dedicated to school programming, especially in rural communities and leveraging residencies and mobile productions.</li> </ul>	
<p style="text-align: center;"><b><u>Organizational Capacity Goals</u></b></p> <ul style="list-style-type: none"> <li>• Board and staff agree staffing levels are “sustainable”. We have sufficient venue staff to ensure the desired audience experience.</li> <li>• We are investing in staff/artist compensation and training at levels commensurate with our desired program excellence.</li> <li>• Our commitment to diversity (including both ‘inherent’ and ‘acquired’) is evident in our staff and board.</li> <li>• We enjoy high engagement and commitment from our volunteers.</li> <li>• We are up to date in our use of technology.</li> </ul>	<p style="text-align: center;"><b><u>Financial Goals</u></b></p> <ul style="list-style-type: none"> <li>• Operating budget is roughly \$2.6MM, growing \$100k-\$200k a year.</li> <li>• Growth is driven by cultivation of additional major donors, national foundations and local/regional corporate support.</li> </ul>

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| <ul style="list-style-type: none"><li>• We have addressed space limitations for rehearsals, office, etc.</li></ul> |  |
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## STRATEGIC PRIORITIES

To achieve these goals, the Festival will focus on four priorities.

- 1. Embark on the initial steps of a capital campaign to transform our space in the Park in a way that enhances artistic excellence and patron experience.**
  - Document our case for support and vision.
  - Dialogue with critical park/community stakeholders.
  - Conduct a feasibility study.
- 2. Solid our status as one the country's top Shakespeare companies by enhancing the artistic excellence, reach, and community impact of our signature programs.**
  - Leverage our success in the Park to showcase our outstanding programming in the community (Shakespeare in the Streets, new work).
  - Increase our regional presence with innovative outreach and more intentionally drawing wider audiences to our local programs.
  - Commission and produce innovative new works.
  - Invest in local artists, especially playwrights and directors, to prepare them for the national stage.
- 3. Create a fundraising capability that generates approximately \$2.6 million annually by 2022 through growing our base of major donors, national foundations and regional corporate support.**
- 4. Invest in our staff team to attract, develop and retain outstanding talent to fulfill the vision of this plan.**

## OVERVIEW OF IMPLEMENTATION

Each of the four priorities has a detailed implementation plan (included in the appendix of this document). Highlights from the implementation plans are shown on the next page.

# Shakespeare Festival of St. Louis – Strategy Timeline

	FY20	FY21	FY22
Programming	<ul style="list-style-type: none"> <li>➤ <b>2 ticketed events outside park</b></li> <li>➤ <b>“Encore” 2nd production in the Park</b></li> <li>➤ Increase commissioning fund</li> <li>➤ Revamped education programs</li> </ul>	<ul style="list-style-type: none"> <li>➤ <b>3 ticketed events outside park</b></li> <li>➤ Add <b>regional tour</b> production</li> </ul>	<ul style="list-style-type: none"> <li>➤ Add <b>second full production in the Park</b></li> <li>➤ Marketing a full “season” of productions</li> </ul>
People Reached	45,000	55,000	70,000
Team & Talent	<ul style="list-style-type: none"> <li>➤ New staff structure</li> <li>➤ Larger Ext. Rel. team</li> <li>➤ Higher artistic compensation (closing gap on LORT C)</li> </ul>	<ul style="list-style-type: none"> <li>➤ New office and appropriate rehearsal space</li> </ul>	
Venue	<ul style="list-style-type: none"> <li>➤ Exploratory discussions with FPF and Park stakeholders</li> <li>➤ Feasibility study with donors</li> <li>➤ Preliminary design</li> </ul>	<ul style="list-style-type: none"> <li>➤ Dialogue and planning continues</li> <li>➤ Construction begins</li> </ul>	<ul style="list-style-type: none"> <li>➤ Inaugural performance in the new venue</li> </ul>
Operating Budget	\$2,000,000	\$2,300,000	\$2,650,000

## PROJECTED FINANCIAL IMPACT

	FY20	FY21	FY22
<b>INVESTMENTS</b>			
<b>Feasibility</b>	<b>\$10,000</b>	<b>\$0</b>	<b>\$0</b>
Feasibility Study	\$10,000		
<b>Artistic Excellence</b>	<b>\$135,000</b>	<b>\$380,000</b>	<b>\$620,000</b>
Investments in “higher artistic quality” (excludes artist fees)	\$40,000	\$40,000	\$60,000
Press campaign	\$5,000	\$5,000	\$5,000
Extend streets residencies	\$10,000	\$15,000	\$20,000
Commissioning workshop(s)	\$30,000	\$40,000	\$60,000
Encore performance in the Park	\$50,000	\$50,000	\$50,000
Roadshow to adjacent cities		\$80,000	\$125,000
Ticketed on-season new plays		\$150,000	\$300,000
Second full show in the Park			\$250,000
<b>Staff Development</b>	<b>\$39,500</b>	<b>\$42,000</b>	<b>\$62,000</b>
Artistic Compensation to achieve LORT-C	\$25,000	\$25,000	\$40,000
Incremental rental expense	\$12,000	\$12,000	\$12,000
Professional development/staff appreciation	\$2,500	\$5,000	\$10,000
<b>Fundraising</b>	<b>\$45,000</b>	<b>\$110,000</b>	<b>\$140,000</b>
2 <sup>nd</sup> staff person	\$25,000	\$50,000	\$60,000
Marketing/PR staff role		\$50,000	\$60,000
Raiser’s Edge cleanup	\$10,000		\$10,000
Festival temp staffing (not in 2019 budget)	\$10,000	\$10,000	\$10,000
<b>TOTAL - Strategic Priorities</b>	<b>\$229,500</b>	<b>\$532,000</b>	<b>\$822,000</b>
Baseline (FY19 @ \$1.7MM)	\$1,734,000	\$1,768,680	\$1,804,054
Projected Expenses	<b>\$1,963,500</b>	<b>\$2,300,680</b>	<b>\$2,626,054</b>
<b>REVENUES</b>			
Earned	\$175,000	\$225,000	\$300,000
Board	\$285,000	\$325,000	\$375,000
Individuals	\$450,000	\$500,000	\$550,000
Corporate	\$340,000	\$400,000	\$475,000
Foundation	\$350,000	\$430,000	\$500,000
Public	\$190,000	\$200,000	\$205,000
Event Revenues	\$200,000	\$225,000	\$250,000
<b>Total Revenue</b>	<b>\$1,990,000</b>	<b>\$2,305,000</b>	<b>\$2,655,000</b>
<b>MARGIN</b>	<b>\$26,500</b>	<b>\$4,320</b>	<b>\$28,946</b>

## ACTION PLAN – CAMPAIGN FEASIBILITY

### STATEMENT OF ACTION, OPPORTUNITY OR INITIATIVE:

Embark on the initial steps of a capital campaign to transform our space in the Park in a way that enhances artistic excellence and patron experience.

ACTIVITIES – NEXT 12 MONTHS	BY WHEN	WHO
1. Meet with Lesley Hoffarth at FPF and Greg Hayes at the Parks Department to gauge openness to the Festival's enhancing the Glen and secure a second meeting.	May 2019	Julie, Mont, Penny, Tom
2. Solicit bids from at least three consultants for a feasibility study	June 2019	Linda, Tom
3. Meet again with Lesley and Greg to convey ideas and obtain blessings to move forward with a feasibility study	June 2019	Kiku, Mont, Tom
4. Reach out to secondary stakeholders: Muny, Art Museum, Zoo	July 2019	Mont, Tom
5. Engage a consultant	July 2019	Linda, Tom
6. Begin feasibility study	Aug 2019	Linda, Mont, Tom

KEY ACTIVITIES – YEARS 2-5	YEAR
1. Wrap up feasibility study and launch silent phase of a campaign	2020
2. Issue call for design proposals	2020
3. Conclude silent phase and announce publicly	2020
4. Award design and construction bids	2021
5. Break ground.	2021

EXPECTED INVESTMENT (big ticket items/staff additions)				
Description	2019	2020	2021	2022
Feasibility study	\$30,000	\$10,000	\$0	\$0
Campaign consultant (capital expense)		\$30,000	\$30,000	
Designers/Architects (capital expense)			\$250,000	

### MEASURABLE TARGETS AND/OR GOALS:

- Complete feasibility study and announce campaign in time to tie-in w/ 20<sup>th</sup> Anniversary (12/31/20).
- Complete campaign and break ground by 12/31/21
- Complete construction by 3/31/23

## ACTION PLAN - ARTISTIC EXCELLENCE

## STATEMENT OF ACTION, OPPORTUNITY OR INITIATIVE:

Solidify our status as one the country's top Shakespeare companies by enhancing the artistic excellence, reach, and community impact of our signature programs.

- Leverage our success in the Park to showcase our outstanding programming in the community (Shakespeare in the Streets, new work).
- Increase our regional presence with innovative outreach and more intentionally drawing wider audiences to our local programs.
- Commission and produce innovative new works.
- Invest in local artists, especially playwrights and directors, to prepare them for the national stage.

ACTIVITIES – NEXT 12 MONTHS	BY WHEN	WHO
7. Launch a commissioning fund to fuel our commitment to new works. (Must start before #2 can really get going.)	Sep/Oct 2019	Tom/Linda
8. Develop a pipeline of <b>ticketed events</b> , leading up to 3 shows annually outside the Park. Continue to embrace opportunities for collaboration with other organizations. TO DISCUSS: HOLIDAY SHOW  <i>The additional shows convey a fuller schedule and more diverse repertory to funders.</i>	Ongoing. Need to narrow in on '20-21 options by end of summer, then start looking further out	Tom w/ Bruce, Nancy, Tom M.
9. Develop a forecast of what it means financially to “increase the artistic quality” of the Park production. Use these forecasts to target underwriting. (Note: increasing artist compensation is in the Staff Development action plan, so this activity focus on other investments.)	First draft: May [BH1] Second draft: August	Tom
10. Invest in a press/PR campaign to encourage national critics to cover our work and raise our national profile.	July 2019	Tom/Linda
11. Re-evaluate our youth programs to ensure we are efficiently and effectively achieving our goals. <ol style="list-style-type: none"> <li>a. Programs that continue should be relevant, vibrant, advance our mission and a good use of staff time.</li> <li>b. Consider finding partners for programs that may no longer be the best use of our resources.</li> </ol>	December 2019	Tom

KEY ACTIVITIES – YEARS 2-5	YEAR
6. Extend In the Streets residencies to 18 months to allow us to better know the communities and tell their stories. (This does not require doing 2 In the Streets within a year.)	2020



KEY ACTIVITIES – YEARS 2-5	YEAR
7. As a <b>first</b> step towards extending our season in the Park, present an “encore” performance of another SFSTL program in Shakespeare Glen.	2020
8. Expand the Confluence Writers project to include four writers in 2020 and five in 2021, while also increasing the commissioning fees we offer the “master playwright”.	2020-21
9. Launch a tour of a Shakespeare play (sized for touring) to take to all counties within a 140-mile radius of St. Louis.	2021
10. As a <b>second</b> step towards extending our season in the Park, commission and present a second work in Shakespeare Glen. This second production might occur in the spring, summer or fall.	2022 (ideally late summer/early fall)
11. As our programming expands begin marketing our events as a true “season”.	2022 <i>A possible growth model: 20-21 adds a second “season” production and 21-22 a third.</i>

EXPECTED INVESTMENT (big ticket items/staff additions)				
Description	2019	2020	2021	2022
Investments in “higher artistic quality” (excludes artist fees)	\$40,000	\$40,000	\$40,000	\$60,000
Press campaign	\$1,000	\$5,000	\$5,000	\$5,000
Extend streets residencies		\$10,000	\$15,000	\$20,000
Commissioning workshop(s)	\$15,000	\$30,000	\$40,000	\$60,000
Encore performance in the Park		\$50,000	\$50,000	\$50,000
Roadshow to adjacent cities			\$80,000	\$125,000
Ticketed on-season new plays			\$150,000	\$300,000
Second full show in the Park				\$250,000

**MEASURABLE TARGETS AND/OR GOALS:**

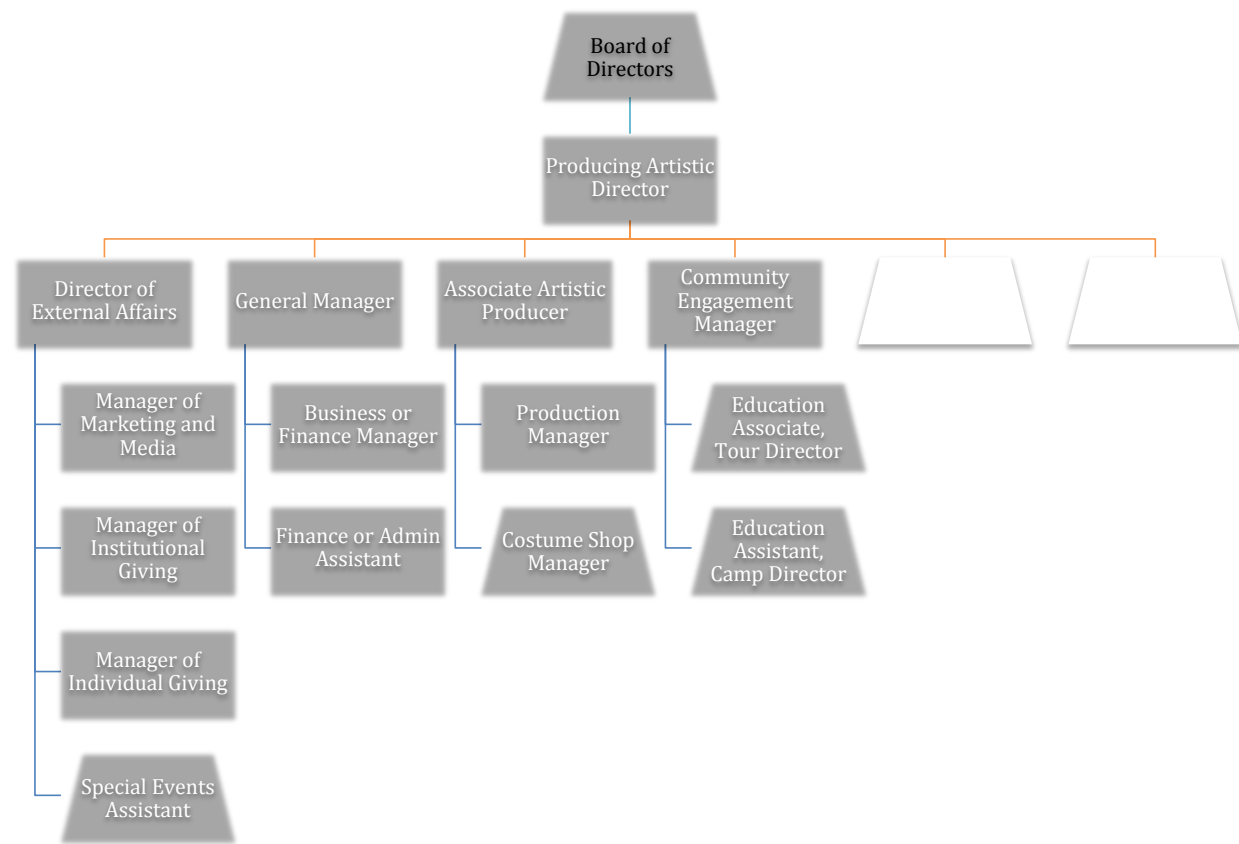
- Presenting a second show (could be an encore of another SFSTL program) by 2020.
- A second (or more) full show becomes an annual occurrence by 2021.

**ACTION PLAN - STAFF DEVELOPMENT****STATEMENT OF ACTION, OPPORTUNITY OR INITIATIVE:**

Invest in our staff team to attract, develop and retain outstanding talent to fulfill the vision of this plan.

ACTIVITIES – NEXT 12 MONTHS	BY WHEN	WHO
1. Launch a series of initiatives to demonstrate our commitment to staff appreciation and intentionally develop a healthy culture. <ul style="list-style-type: none"> <li>a. Pre-season happy hour</li> <li>b. Summer mixers</li> <li>c. Summer planning retreat</li> <li>d. Test weekly all-staffs</li> </ul>	Right away	Tom, Susan, Allie
2. Begin exploring new rehearsal and office space. The rehearsal space should be appropriate for our level of artistic excellence. The office space should support a work environment that appeals to great talent – and better connect us to the artistic community.	July 2019	Tom
3. Obtain salary benchmarking information to inform our future staff compensation strategy.	August 2019	Susan
4. In planning the FY20 season, begin closing the gap on LORT C-1 artist compensation (actors, directors, designers).	August 2019	Tom
5. Team building retreat?	September 2019	Tom/Susan
6. Attend the TCG annual conference to increase our industry visibility and give staff the opportunity to network.	June 2020	Tom

KEY ACTIVITIES – YEARS 2-5	YEAR
1. Move the office and rehearsal studio.	2020
2. Build out a sustained professional development calendar for the team.	2020
3. Split producing and program management responsibilities (and adding staff accordingly) to as our program calendar expands.	2021

Anticipated 2022 Org Chart**EXPECTED INVESTMENT (big ticket items/staff additions)**

Description	2019	2020	2021	2022
Incremental compensation expense (@ 1 park show – need to add more for additional park show and ticketed events)		25,000	25,000	25,000
New staff positions		40,000	50,000	60,000
Incremental rental expense		12,000	12,000	12,000
Professional development/staff appreciation?	1,000	2,500	5,000	10,000

**MEASURABLE TARGETS AND/OR GOALS:**

- Raising staff salaries ~10% over the course of the strategic plan.
- By 2022 we are at LORT C-1 artistic compensation levels for the Park and LORT D for indoor ticketed season

## ACTION PLAN – ANNUAL FUNDRAISING

## STATEMENT OF ACTION, OPPORTUNITY OR INITIATIVE:

Create a fundraising capability that generates approximately \$2.6 million annually by 2022 through growing our base of major donors, national foundations and regional corporate support.

ACTIVITIES – NEXT 12 MONTHS	BY WHEN	WHO
1. Enlist the board's support in identifying and approaching major donor prospects. Hypothesis on our target: "new monied"... successful entrepreneurs, individuals who have sold a business. STLBJ will be a useful reference <ol style="list-style-type: none"> <li>Create a subcommittee of the development committee to focus on this.</li> <li>Provide coaching to the board on the many ways they can help. Get prospects from each board member.</li> <li>Circulate a list of top prospects like we do with corporations and foundations?</li> <li>Test our ability to secure major donor support from outlying areas by emphasizing our commitment to rural-urban collaboration.</li> </ol>	June 2019	Development Committee
2. Change our fundraising calendar to alleviate our end of year crunch. Options include: <ol style="list-style-type: none"> <li>Moving our typical end of year activities to shortly before or after the park performance.</li> <li>Change our fiscal year end.</li> </ol>	June 2019	Tom
3. Re-assess and restructure our philanthropy tactics during the Festival. <ol style="list-style-type: none"> <li>Consider some sort of ask before the show?</li> <li>Free up Linda to focus on spending time with donors (vs. logistical/operational support). This may require contract staff assistance.</li> </ol>	June 2019	Tom
4. Design and execute a more intentional/deliberate donor stewardship process to develop stronger relationships and reduce donor churn (especially among major donors). <ol style="list-style-type: none"> <li>Deeper analysis of donor attrition – who are we losing, at what levels, and why?</li> <li>Set more meetings where we don't make an ask. Use these meetings to seek a better understanding of donors' motivations.</li> <li>Update our use of Raiser's Edge to track and prompt these cultivation meetings.</li> <li>Consider using video to record and share stories of why donors give. (These videos both show our appreciation plus offer connections for other donors.)</li> </ol>	Sept. 2019	Linda

5. Refine our corporate sponsorship package. Reframe the sponsorships as opportunities to advance the corporations' marketing, staff development, workplace camaraderie goals. The value of sponsorship goes beyond sharing art with the community.	September 2019	Linda
6. Start planning our 20 <sup>th</sup> anniversary event. The theme might be something along the lines of "See how far we've come".	September 2019	Development Committee
7. Amplify our efforts to secure funding from national foundations. <ul style="list-style-type: none"> <li>a. Form a subcommittee of the development committee to focus on this.</li> <li>b. Utilize our regional collaboration efforts as a way to attract founders interested in bridging rural-urban divides in our country.</li> </ul>	December 2019	Linda

KEY ACTIVITIES – YEARS 2-5	YEAR
1. Add a resource to the development team to free Linda up to focus on major gift cultivation/solicitation. This new resource could work on grants, events, etc.	2020
2. Find an intern or temp resource to clean up records in our donor database. Greater accuracy will enable more relevant outreach from the Festival.	2020
3. Add Marketing/PR role to the team.	2021
4. Formalize our planned giving program, using bequests to build our endowed funds.	2021
5. Leverage our strength at lower levels in the giving pyramid. Systematize outreach to these donors with the intent to renew and upgrade their support levels. Possible tactics: automated messages, calls from volunteers or staff, etc.	2021

EXPECTED INVESTMENT (big ticket items/staff additions)				
Description	2019	2020	2021	2022
2 <sup>nd</sup> staff person		\$25,000	\$50,000	\$60,000
Marketing/PR staff role			\$50,000	\$60,000
Raiser's Edge cleanup		\$10,000		\$10,000
Festival temp staffing (not in 2019 budget)		\$10,000	\$10,000	\$10,000