

SPOTLIGHT ON THE FUTURE:



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The Z's 2016-2019 Strategic Plan

Introduction

The Zeiterion Theatre is very pleased and very proud to present to the community its “Spotlight on the Future: The Z's 2016-19 Strategic Plan.”

The goals and strategies you will find in the following pages represent what we believe The Z can be for the South Coast community. It is the product of nearly eighteen months of outreach, input, brain-storming, and deliberation by hundreds of people who care deeply about The Z and our community. We welcome you to read it, ponder it, and be energized by it. Most of all, we want you to join us in the exciting next chapter of The Z's growth and service.

Background

In the fall of 2014, the Board of Trustees formed a strategic planning committee to direct a process for charting the Zeiterion Performing Arts Center's course over the next several years. Previously, in 2011, an ad hoc planning committee spent several months analyzing the environment in which the Zeiterion (“The Z”) operated to assist an anticipated future strategic planning process. At the end of that early effort, the ad hoc committee made several recommendations to the board:

- Decide what The Z can be in five years
- If the five year vision includes remaining in the existing building, fully commit to gaining control over it and significantly improving it
- Broaden earned income through value, increasing it to 85% of total revenue
- Enhance the major donor base
- Enhance board skills, including connectors – people who can create relationships, capacity – ability to give, and marketing
- Strengthen political support

In the five years since that report, The Z and the city of New Bedford have gone through many significant changes. In 2013, the tandem team of Rosemary Gill and Justin LaCroix assumed the co-equal roles of

Executive Directors of Programming & Development and Facility & Production, respectively. Another significant change in The Z's direction came in the form of the long-anticipated formal contract with the city. With an executed contract to manage the theater, The Z and the city now have improved clarity in their relationship and respective rights, responsibilities, and financial expectations. Meanwhile, notwithstanding the challenges that all gateway cities face, New Bedford's renaissance continues. Redesign and beautification of roads and pedestrian walkways have created synergies between the working waterfront, the downtown, and historic areas. The theater's location on the perimeter of these improvements presents both opportunities and challenges. Otherwise, much of The Z's operating environment – and therefore its opportunities and challenges – has remained the same. The city of New Bedford retains the character of an historic, mid-sized urban community. Its high number of ethnic populations and neighborhoods give the city a rich cultural diversity, although like cities with similar demographics, there are challenges with unemployment and educational attainment. The Z still functions in a grand, but aging building which has ongoing issues of deferred maintenance that need to be addressed, but also present untapped potential in terms of space and capacity.

The Process

With the report from the ad hoc committee and The Z's operating environment as context, the Committee's starting point for future planning was to look at the mission statement to see if it still reflected what The Z is, what it does, and what it "should" be. Both the staff and board (at a board retreat) provided a great deal of insight in this exercise. The proposed revision is laid out in the very first section of the plan, although it evolved concurrently with the planning process. To gain a baseline understanding of The Z's situation today in relation to its past, we gathered historical data on key metrics: finances, number and genres of shows, audience numbers, donor numbers. Next, we sought input from the full range of The Z's constituents and partners on their perspectives on The Z. In addition, five targeted surveys were sent out to these distinct groups: patrons, board, educators, The Z's volunteer corps and community partners. Brainstorming meetings were held with individual staff and volunteers. Heads of departments (Development, Education, etc.), a representative from the City of New Bedford, and the chair of the board's Nominating Committee were invited to committee meetings to present their perspectives as well. Based on this input, the Planning Committee directed its focus on the following areas:

- Programming
- Patron Experience
- Education
- Audience development (marketing)
- Facility/equipment resources
- Finances

- Organizational capacity (staffing and volunteers)
- Governance capacity (board development and support)
- Fundraising (including capital needs)

On June 13, 2015, the Board of Trustees held a strategic planning retreat to discuss and evaluate the input and ideas that had been identified through the process. Following the retreat, the Committee, working in conjunction with Z staff, continued its deliberations and began work on drafting the strategic plan. The committee decided that the most practical approach would be to create a three-year (versus a five year) plan, given the pace of change within and around the organization. Accordingly, the years covered by the strategic plan follow the “season/fiscal” years of The Z: 2016-17, 2017-18, and 2018-19. The committee would like to thank all of The Z’s constituents, partners, staff and trustees for the time and the passion they have invested in this process. Most of all, we would like to thank Dave Prentiss, who generously and enthusiastically donated his time and experience in leading the committee every step of the way. We are very proud and pleased to present this plan for the Board’s consideration.

On behalf of the Planning Committee,
Rachel Deery, Chair

Committee Members

Zeiterion Board:	Gail Davidson Rachel Deery Peter Hughes Eileen Mullen Jeff Pontiff	Facilitator: Dave Prentiss, President and CEO, New Bedford Symphony Orchestra
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Zeiterion Staff:	Rosemary Gill, Executive Director, Programming and Development Justin LaCroix, Executive Director, Production and Facilities Matthew Gomes, Office Manager
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I. Our Mission and Vision will reflect the current reality and aspirations of The Z

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Statement on Mission and Vision

Based on the input of trustees, staff and other stakeholders, there was a strong feeling that The Z's mission statement accurately reflected the substance of the organization's purpose and direction. However, it was apparent that some elements of the mission statement were presented as aspirational when in fact they were now being carried out by The Z. Moreover, the mission statement contained sections that were more properly treated as part of The Z's vision rather than its mission. Accordingly, the substance of the mission was not changed, but the mission statement has been revised to address these concerns, including the adoption of a separate vision statement. Finally, a statement on guiding principles and core values was developed to reflect the full scope of The Z's organizational philosophy.

The fundamental principles of The Z's mission, as well as the spirit of our vision, guiding principles and core values, inform everything that follows on the pages of this strategic plan. In each area of The Z's programs and operations, we endeavor to bring to life the purpose, aspirations, and values that make us who we are.

Mission

The Zeiterion Theatre entertains, educates, and inspires our community by presenting a diverse array of high quality performing artists and providing engaging learning opportunities that contribute to the cultural, social and economic vitality of the South Coast.

Vision

To create a shared human experience that enriches people's lives by harnessing the power of the performing arts to connect generations, unite diverse groups, and open a world of creativity and new possibilities for all.

Guiding Principles and Core Values

The Zeiterion Theatre will

- present a broad range of the highest caliber national and international performing artists
- provide programs that speak to the diversity of cultures and interests in the region
- engage and enrich the community's participation, experience and understanding of the world, the arts, and creativity

I. OUR MISSION AND VISION WILL REFLECT THE CURRENT REALITY AND ASPIRATIONS OF THE Z

- provide young people with live performances and educational programs that teach the power of the performing arts, the joys of creativity, and the discipline, concentration and hard work needed for success in the arts and in life
- actively participate in the revitalization of downtown New Bedford
- provide a welcoming home to the New Bedford Symphony Orchestra, New Bedford Festival Theatre, South Coast Children's Theater, as well as community groups and other organizations.
- create meaningful and lasting partnerships with community organizations, schools and local businesses
- provide an accessible arts experience to all members of the community
- in partnership with the City of New Bedford, preserve a place for the performing arts in our community by maintaining the historic Zeiterion Theatre

II. The Z will broaden and deepen its impact in the community by building on its current programming model and exploring new ways to bring the full power of the performing arts to the community.

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Statement on Programming

The performing arts enrich our lives, giving each of us deeper insight into the human condition and creating avenues for personal expression. They also strengthen communities by bringing people together and offering opportunities for individuals to engage one another, build bridges to neighborly understanding and celebrate the human spirit. Shared artistic experiences can be powerful unifying forces, affirming deep bonds across cultural, ethnic, and generational lines.

The Z's programming objectives are guided by our mission, values and goals. As such, we are committed to programming that entertains, educates, engages, and inspires the community. The model we use to attain these objectives was established several years ago, and is described in detail below. Based on both internal assessments and external survey responses, the model continues to work very well. Over the last two years, this model has been strengthened through sound business and financial practices, which provides a fiscal foundation for continued development and exploration in programming opportunities.

However, for The Z to fully realize its growing potential we must also consider that there are still many people in our community who do not interact with us in any way. Although the bulk of our audiences come from New Bedford, we know that eight out of nine New Bedford residents do not come to The Z. Not only must we grow and cultivate an increasingly loyal audience, that audience must also be diverse, younger and reflect the greater New Bedford community.

As we look towards the future, we plan to continue reflecting on ways in which we can improve current programming models and create new programming initiatives with an eye towards innovation and responsiveness to our community's needs. We see opportunity for doing just that by building on two programming strategies which have proven successful in the past, and by embarking on a new strategy which holds exciting potential.

The first of the successful past strategies which we plan to expand is ArtsBridge. ArtsBridge strengthens and connects our three programming pillars: performance, education and community, in order to engage our community with the arts in a deeper way than any can do alone and often illuminate issues of relevance to the wider community. Community partnerships are an essential component to ArtsBridge programs. An example of ArtsBridge is when The Z presented two theatrical performances surrounding the theme of the

II. THE Z WILL BROADEN AND DEEPEN ITS IMPACT IN THE COMMUNITY...

Holocaust, Simon Wiesenthal: Nazi Hunter and The World of Anne Frank. We partnered with the Jewish Federation, Tifereth Israel Synagogue, and Spinner Publications to offer several events in conjunction with the plays, including a pre-show **From Page to Stage book club** discussion of “Branded on My Arm and in My Soul: A Holocaust Memoir” by Abraham Landau, former New Bedford resident and activist; a School Time performance of both plays for area students; an art exhibit, procured by Spinner Publications, featuring the story of Abe Landau as described in his memoir, and stories of local liberators of the Holocaust.

The other proven strategy that calls for expansion is Arts Access. We believe The Z is central to the life of the city of New Bedford and the region and therefore we are committed to ensuring that the arts are accessible to everyone in our community. By strengthening our focus on free Arts Access programs, we will deepen our impact in the community by providing dynamic artist residencies, community book discussions, thousands of tickets to financially disadvantaged children and their families, and free community programs such as the Viva Portugal! festival and Movies in the Park. A new programming concept that presents The Z with a number of strategic benefits is festivals. Producing festivals has the potential to leverage the expertise of The Z’s production, front of house, and programming staff to build visibility for the organization, to enhance the role of The Z as a community asset, and bring the performing arts into the community. This expanded reach will support our mission, including our educational goals, while helping to increase earned income, foster partnerships with businesses not typically tuned in to The Z, and add to our niche programming.

All of these strategies require strong community cross-sector partnerships to ensure their long-term success.

As indicated above, the current programming model we use has and continues to work very well. This model uses many different criteria. The majority of our programming efforts are focused on a specific performance and the activities surrounding that performance. The following criteria inform that programming:

When choosing an individual program:

- Excellence - Is the program/performance of the most excellent quality?
- Discovery – Does this program/performance allow us to share with our constituents our discovery of performers and creators who are forging new paths? Does this program offer our audiences the opportunity to discover a new artist or discipline?
- Relevance – Does this program/performance speak to issues of relevance in our community? Does this program offer civic value, address social issues, broaden perspectives and bring people together? Is it conducive to civil discourse? Does it have strong historical ties to our region?
- Inclusion – Does this program/performance promote inclusiveness and accessibility? Will it resonate with people not engaging with The Z now?
- Authenticity – Does this program/performance represent an authentic experience, culture or artistic expression, with special attention to authenticity for groups not now coming to Z?

- Risk Assessment – Does it make fiscal sense to present this program/performance? Do the numbers work? If the numbers indicate great risk, is the benefit to our mission worth the risk?

When programming the season overall:

- Diversity –Does our season include a diversity of disciplines and offerings? Does it reflect a variety of cultural perspectives or celebrate artists from underrepresented communities?
- Balance – Does our season offer a balance of programs that ensure financial stability? In other words, are there enough profitable shows to support programs that we know will lose money but are important to our mission?
- Access – Are we providing multiple points of entry and/or removing barriers to participation by those who traditionally have not engaged with The Z?

As discussed above and outlined below, the fine-tuning of current programming practices and the introduction of new programming ideas mainly involves programming activities that fit within the current capacity of The Z. In most cases, what is being addressed in this section involves the types of shows that we bring to The Z, not the need to bring more shows to the Z. In this regard, it must be stressed that “the current capacity” of The Z already involves a substantial strain on The Z staff. The current strain on staff must be addressed both with respect to the specific capacity of the programming staff and all other areas of Z staffing and volunteer capacity affected by programming.

Programming Objectives

Accomplished in 2015-16

1. Hosting of Viva Portugal! Festival
2. Launching of New Bedford Folk Festival
3. Launching of New Bedford Whaling Blues Festival

2016-17

1. As financial resources permit, increase staff to include a FTE programming and/or outreach position
2. Host the NB Folk Festival and the NB Whaling Blues Festival
3. If data analysis warrants it, host Viva Portugal!, for a second year
4. Deepen thematic development of programming
5. Actively seek opportunities to increase access and diversity
6. Actively seek out programs that will attract younger audiences
7. Institutionalize mechanisms for staff and public to offer programmatic suggestions

II. THE Z WILL BROADEN AND DEEPEN ITS IMPACT IN THE COMMUNITY...

8. Strengthen existing and develop new relationships with organizations that will help us reach underserved and disadvantaged children and their families
9. Keep and analyze data on expenses, earned income, attendance, marketing impact, partners and sponsorship development generated by the festivals and other community events

2017-18

1. Assess last year's program growth, participation, and impact to guide adjustments to existing programs and the development of new programs
2. Continue to assess and address staffing needs for programming and all related staffing and volunteer requirements.
3. If data analysis warrants it, host NB Folk Festival and NB Whaling Blues Festival and Viva Portugal!

2018-19

1. Assess last year's program growth, participation, and impact to guide adjustments to existing programs and the development of new programs.
2. If data analysis warrants it, The Z will continue to host the festivals, and consider longer term commitments and/or other related strategic opportunities.
3. Continue to assess and address staffing needs for programming and all related staffing and volunteer requirements.

III. The Z will provide a highly professional, friendly and engaging patron experience that will make people think of The Z as “their” performing arts center.

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Statement on Patron Experience

We consider patron experience to be an integral component of The Z’s mission to serve the community. While patron experience includes the important aspect of high quality customer service, we view it as much more. For The Z to be a part of the community, the community has to be part of The Z. The kind of patron experience we aspire to provide plays a critical role in making this happen. From volunteers to staff to trustees, the message that we want to come through in all our interactions with patrons is that you are among friends, and that we are here to help you. In this way, we will give our patrons every reason to make The Z their performing arts center.

Over the next three years, we will build on the current strengths of The Z’s staff and volunteers to increase the range of patron services we provide and our training as customer service professionals. Through ongoing feedback, assessment, and attention to detail, we will continue to improve all aspects of the patron experience.

Patron Experience Objectives

2016- 2019

1. Develop an ongoing patron input and assessment system that includes regular review by staff and an action-steps and follow-up mechanism.
2. Review, enhance and conduct regularized training for emergency procedures.
3. Expand ongoing training program and professional development for customer service best practices, including disability access and ADA policies.
4. Review website and all other communication channels to enhance patron-related information and ease of access.
5. Develop and implement improvements in parking options and signage.
6. Draft a Patron Experience mission statement for inclusion in training program.
7. Move box office to sidewalk and institute ticket scanning system.
8. Establish inspection protocol to address on an ongoing basis facility cleanliness, safety and maintenance issues.

III. THE Z WILL PROVIDE A HIGHLY PROFESSIONAL, FRIENDLY AND ENGAGING PATRON EXPERIENCE...

9. Develop a “first-time-to-The-Z” program to welcome and assist new patrons.
10. Institute a periodic and regular focus of staff meeting time to discuss new or enhanced patron experience initiatives, such as expanded use of Member Lounge, more communication with patrons, more satellite concessions areas, season tickets, etc.

IV. The Z's educational programming will be enriched and expanded, establishing The Z as an education leader in the community.

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Statement on Education

The Z is committed to providing access to high quality and diverse educational programs that use the power of the performing arts to enrich the lives of the members of our community. While we have a special emphasis on serving children, the full reach of our programming encompasses opportunities for young adults, teachers, seniors, and people from all walks of life.

In years past, The Z's education program was heavily focused on the SchoolTime performance series. While SchoolTime continues to be the principal feature of the education program, we have begun to explore new offerings and revive ones that once were. This reflects a shift in thinking of The Z both a presenter of the arts, and as facilitator of the creation of the arts as well.

Growing and sustaining both new and established programs comes with a fair share of challenges. Creating visibility, garnering interest and participation, as well as allocating funding will be the main points of focus in the immediate future.

With respect to SchoolTime, the largest program we offer, there are a number of unique challenges. We understand that schools are faced with new challenges every year that create barriers to attending performances. For many schools, finances are a great concern. In addition, there is the pressure of meeting state requirements for test scores, which impacts the time available to attend The Z's educational programs. We need to work closely with teachers and administrators and support them with resources that they can use to enhance the integration of the arts in the school curriculum. Through this partnership, we will help our schools provide children with an understanding and appreciation of the world of performing arts.

Education Objectives

Accomplished in 2015-16

1. Create education coordinator position.
2. Strengthen relationship with New Bedford Public Schools, University of Massachusetts Dartmouth and Bristol Community College.
3. Establish Teen Ambassador program to facilitate learning in the arts through exposure, collaboration, creativity and engagement in the arts.

IV. THE Z'S EDUCATIONAL PROGRAMING WILL BE ENRICHED AND EXPANDED...

4. Establish Creative Classroom program that offers classes for learners of all ages and abilities in a variety of mediums. This program provides active participation in the arts and deepens the connection students (both young and old) have with The Z.

2016-17

1. Continue to strengthen relationship with New Bedford Public Schools, University of Massachusetts Dartmouth and Bristol Community College.
2. Maintain current and seek out additional grant and sponsorship opportunities to educational programming, including transportation costs for students to travel to The Z.
3. At the start of each season, set annual growth targets for both programming and participation.
4. Expand Teen Ambassador program to facilitate learning in the arts through exposure, collaboration, creativity and engagement in the arts.
5. Expand Creative Classroom program that offers classes for learners of all ages and abilities in a variety of mediums. This program provides active participation in the arts and deepens the connection students (both young and old) have with The Z.
6. Continue and strengthen Z internship programs, with an initial focus on arts administration and including development, marketing, education and patron services.
7. Offer professional development workshops that meet the needs and interests of the region's educators, such as programs providing arts integration workshops for area teachers to use in their classrooms. This program leverages the economy of scale principal and also established important community connections with institutions such as BCC and UMASS Dartmouth as well as the public school system.

2017-18

1. Assess last year's program growth, participation, and impact to guide adjustments to existing programs and the development of new programs.
2. If warranted by analysis in #1 above, continue to grow the Teen Ambassador program, the Internship program, and The Z's Creative Classroom into stable, established education programs at The Z.
3. Boost marketing effort to educators.
4. Increase efforts to gain visibility and increased awareness of The Z's educational programs to our donors, funders, patrons and the community.
5. Establish Summer Musical Theatre Institute that offers training in singing, dancing, acting, set design and costuming. The program will be supervised by skilled professionals and will culminate in a public performance at the end of a two-week session. (Tuition will cover direct costs.)

6. Increase opportunities for underserved children to experience performing arts programming through such measures as more free or reduced tickets provided to underserved youth for SchoolTime programs (including transportation costs) and providing scholarships for the Teen Ambassador program and Creative Classroom courses.
7. Actively seek out and negotiate more opportunities for visiting artists to connect with our audiences (adult and children) through artist-led workshops, lecture or demonstrations, Q&A's and masterclasses.

2018-19

1. Assess last year's program growth, participation, and impact to guide adjustments to existing programs and the development of new programs.
2. Consolidate growth and strengthen existing programs.
3. Begin planning process for future growth and improvement of educational programs.

V. The Z's audience development and marketing efforts will expand their scope and deepen their reach into all segments of the community.

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Statement on Audience Development and Marketing

Audience development reflects the relationship with audiences that grows over time with a focus on the long-term. It can include aspects of marketing, programming, education, customer care and “place.” In a broad sense, audience development focuses on finding audience outside the mainstream like new audience, or audiences from socially excluded groups. It can also focus in on genre-specific audiences.

Regarding the latter, The Z recognizes that certain performing arts genres – namely dance and theater - do not come with a large, ready-made audience in this region. While we are mindful about the predictable ticket-buying results and plan accordingly, we want to take steps to deepen the relationships with current audience and broaden our reach, by increments, with new audience. We move forward using the principles illustrated in the Wallace Foundation audience development publication “Road to Results: Effective Practices for Building Arts Audiences.” Their strategy focuses on nine effective practices which include: identifying target audience, determining what kinds of barriers need to be removed, developing a vision for how the target audience will interact with The Z, providing engaging experiences to introduce them to The Z and art forms, as well as evaluation, measuring and adjusting staff roles. This Genre-Specific Audience Development Model includes the following engagement experiences:

1. Choose spokespeople for dance, theater, etc.
2. Create a blog that focuses on the genre.
3. Present performances outside of The Z to reach new constituencies in city neighborhoods and other communities in the region.
4. Dance or Theater Lovers Meet-Up: create event with speakers and film around the topic.
5. Dance or Theater Lovers Outing: Organize a trip to see Jacob’s Pillow Spring/Summer 2016.
6. Dance or Theater Classes & Showcase: offer dance or theater classes.
7. Dance or Theater Ambassadors: invite core fans to solicit their friends.
8. Brand dance or theater spokespeople as “authorities” through written pieces and appearances.

Beyond audience development in specific genres, The Z also strives to deepen its relationship with current audience as well as to bring new audience into the theater. We seek to understand how current attendees – and non-attendees – see our organization and programs so we can continue to improve our brand message

and promotional techniques. We explore the variables contained within the six pillars of marketing – plan, price, product, promotion, place and partnerships. To accomplish a fully realized audience development initiative, as well as to reach within a targeted geographic region, additional human and financial resources are needed. Building relationships that pay dividends over time takes an investment of time, care and feeding.

Audience Development and Marketing Objectives

Accomplished in 2015-16

1. Create a part-time, in-house graphic designer position (in 2015-16 budget).
2. Establish part-time Marketing Coordinator position to work on new outreach and audience development programs, with an emphasis on digital content creation (in 2015-16 budget).
3. Increase season brochure printing from 75,000 to 90,000 (in 2015-16 budget).

2016-17

1. Explore and experiment with methods to transform single ticket buyers into multiple ticket buyers, how to inspire ticket buyers to become a member, and how to turn a member into a donor.
2. Create a working plan for the 2017-2018 season to increase penetration into a targeted geographic region (the exact area to be determined and called “Region 1”) through pointed outreach and marketing programs that go beyond our walls to create awareness, develop relationship and foster connection, with a goal of increased individual ticket sales, group sales and memberships.
3. Increase per show promotional budgets commensurate with financial resources.
4. Increase part-time Marketing Coordinator to full-time if budget resources permit.
5. Assess group sales efforts and determine what other resources and methods may help increase sales.

2017-18

1. Assess last year’s audience development and marketing programs to guide adjustments to existing programs and the development of new programs.
2. Increase per show promotional budgets commensurate with financial resources.
3. Implement action plan to deepen penetration in Region 1 as assess measurable outcomes.
4. Create plan to add a second targeted area (to be called “Region 2”) in the 2018-2019 season.
5. Continue to explore and experiment with methods to transform single ticket buyers into multiple ticket buyers, how to inspire ticket buyers to become a member, and how to turn a member into a donor.

2018-19

1. Assess last year's audience development and marketing programs to guide adjustments to existing programs and the development of new programs.
2. Continue to increase per show promotional budgets as needed and commensurate with financial resources.
3. Continue to explore and experiment with methods to transform single ticket buyers into multiple ticket buyers, how to inspire ticket buyers to become a member, and how to turn a member into a donor.
4. Continue to focus on broadening audience with increased penetration into targeted geographic regions through pointed outreach and marketing programs that go beyond our walls to create awareness, develop relationships and foster connection.
5. Consolidate growth and strengthen existing audience development and marketing programs.

VI. The Z will maintain a vigorous focus on fund development and increase philanthropic support to ensure the financial stability and sustainable growth of the organization.

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Statement on the Culture of Philanthropy at The Z

The Z has a strong focus on earned revenue, as it makes up over 80% of our overall revenue, thus attaining one of the Ad Hoc Committee goals. However, there will always be a gap which must be closed through contributed income. Of the two pieces in the revenue picture, contributed income is the area with the most compelling strategic potential to attain financial stability and to grow the organization.

Over 75% of contributed income is garnered through individual support. Therefore, The Z executive leadership, board of directors, and staff must continue to develop a culture of philanthropy, one where all stakeholders understand the need for contributed income, and the fundraising process is deeply engrained in the philosophy and vision of the organization. Within this culture is a donor-focused relationship driven model of fund development. A significant area of growth for The Z should be major gifts. This is the least expensive form of fundraising, and is focused solely on relationships and face-to-face requests. A major gift at The Z is currently defined as over \$5,000. Currently, The Z is at risk of losing major donors without knowing the next group of major donors. In order to increase the major gifts program, we must know whom to ask and for how much. Prospect research tools will help us to do this, as well as identify who is already in our pool of donors and others we should be cultivating based on who they know.

Another area issue that needs further attention is the relationship between membership and annual fund. One important difference between the two programs is that membership focuses on providing benefits and perks with limited tax-deductibility while annual fund giving does not provide benefits or perks but is fully tax-deductible. In order to grow revenue in these areas, they should be used to support each other, creating a continuum of engagement – from patron, to member, to donor. In order to accomplish this, we need to gather data on the relationship between benefit use and level of membership and fine-tune the programs accordingly. Based on anecdotal evidence, our hypothesis is that benefit usage decreases at the higher levels of membership. In other words, that the person is thinking more in philanthropic terms than transactional terms. If the data supports this hypothesis, then the leadership level membership categories (The Muse Society) will be combined with the Annual Fund to leverage additional donations.

Grants and corporate sponsorships are also important areas that need continued improvements. In addition, capital and special project funding campaigns must be developed in a manner that does not undermine the growth of the programs which support annual operating needs.

Since capital needs are an important aspect of the current strategic planning process, they are discussed in detail in Section IX below, but the fundraising approach necessary to address those needs is outlined in the present section. In addition, the inclusion of a reserve fund as part of the campaign should be considered.

Fundraising Objectives

Accomplished in 2015-16

1. Establish a procedure and timeline so that fundraising goals for the fiscal year are developed as part of each year's organizational budget process.
2. Establish a procedure and timeline so that an annual fundraising plan is prepared by the Development Committee and approved by the Board to achieve the fundraising revenue contained in the annual budget. These plans will address major gifts, annual fund and membership, searching for more grant opportunities that fund general operating and capacity building, and continuing to grow corporate sponsorships.
3. Gather data on the relationship between use of membership benefits and level of membership and fine tune program to maximize the growth of each.
4. Increase Concierge ticketing service as a benefit for the Muse Society (currently a \$1,000+ membership level).
5. Purchase/subscribe to the necessary prospect research tools to support major gift program (in 2015-16 budget.)

2016-17

1. Form a steering committee to begin in-house research and feasibility assessment for a capital campaign to address The Z's most immediate facility and equipment needs (see Section IX below).
2. Assess last year's fundraising programs to guide adjustments to existing programs and the development of new programs.
3. Continue to grow all fundraising programs to meet operating budget needs.
4. Turn leadership level membership (\$1,000+) into Annual Fund categories, leveraging the Muse Society as an incentive to upgrade giving. These categories will be less benefit driven. Instead, they will be philanthropic categories with reciprocal member benefits. This change will take place if and when we find that the data supports our hypothesis as indicated above.
5. Launch monthly giving sustainer program (Membership).
6. Launch loyalty program to Members.

2017-18

1. If warranted by the results of the in-house research and feasibility assessment, form a capital campaign committee to develop and initiate a capital campaign. As part of the campaign, (a) hire additional fundraising staff and/or consultant as needed, (b) leverage relationships with Z partners such as the City of New Bedford, New Bedford Symphony Orchestra, Festival Theatre and others, and (c) secure matching and challenge gifts and other support from individual, business, public, and foundation sources.
2. Assess last year's fundraising programs to guide adjustments to existing programs and the development of new programs.
3. Continue to grow all fundraising programs to meet operating budget needs.
4. Explore restricted operating funding programs – opportunities for donors to fund projects already designated in the operating budget. This frees up money for other projects and influences what is built into the operating budget from year to year.

2018-19

1. Continue capital campaign and assess future capital and endowment needs with an eye towards The Z's centennial in 2023.
2. Assess last year's fundraising programs to guide adjustments to existing programs and the development of new programs.
3. Continue to grow all fundraising programs to meet operating budget needs.
4. Explore special project funds – this is money that is restricted by the donor and is not in the operating budget. When raising money for special projects, the full amount must be raised in order for the project to go forward. Often times this is capital related, but can also fund new programs.

VII. The Z will increase operational capacity by addressing staffing and wage issues as well as by tapping into the energy and talents of a motivated volunteer pool.

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Statement on Operational Capacity

As The Z continues to grow, it will be necessary to address staffing issues relating to administration, facility operations, event production and rentals. Moreover, the critical role that volunteers play at The Z is an important strategic consideration for the organization's future. These issues are addressed below, or in cases where staff needs fall within the category of a particular section in this plan (e.g. Marketing), they are addressed in the pertinent section.

The Z currently has one full-time position devoted to facility maintenance, custodial needs and concession and event-related set up and breakdown operations. As the tempo of shows, events, activities and rentals has steadily increased, additional staff resources are needed in these areas.

The Z currently has one full-time position devoted to production, with the balance of production work being handled by part-time and "per event" staff. A second full-time position would significantly improve The Z's ability to manage production needs. In addition, The Z's pay scale for part-time and per event production work must be addressed as it has fallen behind the rest of the industry and has made it increasingly difficult to attract and retain staff.

The volunteer ushers of The Z provide thousands of hours of professional service to the organization every year. Notwithstanding the outstanding contributions they are already making to the success of

The Z, both The Z staff and the ushers themselves believe that their dedication and talents could be utilized even more in front-of-house operations, as well as other areas within the organization.

Because of the gradual nature of the goals in these areas, the following objectives will cover the full time period of the strategic plan.

Operational Capacity Objectives

2016-19

1. As financial resources permit, increase maintenance staff gradually to a second FTE employee.
2. As financial resources permit, increase production staff gradually to a second FTE employee.

3. As financial resources permit, increase staff to include administrative support to the executive directors.
4. Increase the pay scale of part-time and per event production staff to be competitive enough with industry standards to attract and retain staff.
5. Increase efforts to recruit additional ushers and volunteers and continue strong training and professional development for them.
6. Work with ushers and other volunteers to expand the scope of their roles and responsibilities, exploring how they can be helpful in the following areas: front-of-house operations, facility support, assisting with education, marketing and fundraising activities, and serving on committees.

VIII. The Board of Trustees will renew its commitment to board governance so that, together with the Executive Directors, it can lead The Z forward through the opportunities and challenges outlined in this plan and those of the future.

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Statement on Governance

The governance philosophy of The Z is based on having clear lines of responsibility, insisting on individual and organizational accountability, and embracing a team concept of mutual respect and collegiality. As the ultimate authority of The Z, the Board of Trustees has the responsibility of governing the organization and themselves. With strong leadership by the Board and senior management, The Z will continue to broaden and deepen its impact on the community.

Governance Objectives

Accomplished in 2015-16

1. Establish governance committee.
2. Initiate aggressive process of recruiting new trustees to eventually reach 29 maximum allowed under bylaws. This number is necessary to fill committees adequately.
3. Revise and update the bylaws: (1) add description of the treasurer position, (2) eliminate the CEO provision and clarify the executive director role(s), (3) make provision for an Advisory Council, (4) clarify trustee emeritus status and how or whether it relates to Advisory Council membership.

2016-17

1. Adopt nominations policy and procedure statement.
2. Continue process of recruiting new trustees to reach 29 maximum allowed under bylaws.
3. Continue to revise and update bylaws as necessary, including a consideration of adding a description of standing committees, specifying that the governance committee also has nominating responsibilities.
4. Create and begin recruiting for the Advisory Council.
5. Make strategic planning a permanent agenda item at board meetings for the planning committee to report on the implementation of the current plan and assess its impact.

2017-18

1. Continue recruiting members for the Advisory Council.
2. Develop orientation programs for new trustees and new advisors.
3. Institute a “board education” program which would include (1) staff members periodically making short presentations at board meeting regarding their area of expertise, new programs, etc., (2) trustees attending at least one Z education program each year, and (3) periodic “behind the scenes” tours of The Z for trustees to learn more about Z operations.
4. Institute a board leadership policy that will provide guidelines on the qualities necessary to serve as a board officer or committee chair and outline the path to serving in those positions.
5. Institute a succession policy providing guidelines on how the board will handle any sudden or planned executive director transition.

2018-19

1. Assess results of the governance initiatives adopted over last two years and revise if necessary.
2. Begin preparations for the next strategic planning process.

IX. The Z will improve its facility by addressing issues of deferred maintenance, overdue technology upgrades, and other capital improvements in critical areas.

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Statement on Capital Needs

The Z's home is the historic 1923 vaudeville theatre known as the Zeiterion Theatre. The city and The Z have had a long history of maintaining and improving this historical gem and continue with that partnership to this day. That said, there are some capital needs that go beyond what the city is able to provide year after year. Not only are some of these improvements and acquisitions needed to bring the building up to date but they are also needed to support and keep up with the ever-changing needs of current touring productions. The discussion below is premised on determining (1) the appropriate legal provisions for capital fundraising with respect to a city-owned building, (2) ensuring The Z's management contract with the city has the necessary duration and related provisions in connection with undertaking a capital campaign, and (3) for any capital improvements which would be located in the basement, on resolving the flooding problem in The Z's basement.

The top priority capital project is a new, state of the art marquee. Currently there is no marquee or sign. A marquee that is carefully designed to fit within the building's original aesthetics will not only preserve the original historical nature of the building but will heighten the theatre's visibility and serve as a dynamic advertising medium for events and activities. The other top priorities are related to the video, sound, and lighting upgrades which are needed to ensure that The Z is able to continue to provide industry standard equipment for the best shows currently on tour.

The above priorities are the top production and organizational capital needs, it's also important to include our patrons' point of view. In a survey distributed to our members and patrons, replacing the theatre seats and upgrading the bathroom facilities were identified as the top facility priorities.

Below is a list of capital improvement projects in the order of priority suggested by the input received in the strategic planning process regarding both organizational and patron-centric needs. The following items will dramatically increase the appeal and profile of The Z in the region, improve the quality of the patron experience, and raise the standard of the professionalism of Z operations. In addition to these capital improvements, a portion of the campaign will be designated as a reserve fund to enhance the financial stability of the organization. Moreover, annual operating budget savings in equipment rental costs realized by the purchase of the new equipment will be added to the reserve fund. The total amount of this campaign is \$1.6 million. A giving pyramid for this amount is provided in the appendix.

Capital Needs Objectives

1. Marquee: \$425,000

A new marquee is sorely needed to enhance the façade of the theatre. Currently it is very hard to identify the building as a theatre or what events are going on inside. A new historical looking but digital marquee would allow us to better advertise upcoming performances, energize this part of Purchase Street, and make it welcoming.

2. Seating: \$250,000 (current configuration)

The number one patron requested upgrade is new seats. Currently the seats are of many different types and in different states of wear and tear. Many seats are missing some cushion, have springs poking through, or have rips and tears. While we strive to maintain these seats the sheer number make it impossible to have all seats in perfect condition at any given time. Replacing the current seats would allow us to offer more comfortable seats for our patrons throughout and ensure that they are all the same type! We could possibly gain a few seats with this replacement and we would be able to create a maintenance plan that would be able to keep up with seat repairs going forward. We would also examine the possibility of spreading out the wheel chair seats throughout the venue per ADA law which is not currently possible with the seats we have. The wheelchair seats would have temporary seats that are similar to the permanent seats so patrons would not be sitting in folding or orchestra chairs. We would also have easier ability to remove certain sections when needed for special events and not have the bolts sticking up from the floor. For example, when we need a larger orchestra pit, or adding the stage extension for events like The Z's gala.

3. Bathrooms: \$150,000

Current bathrooms are not sufficient to accommodate the number of patrons that come through the Zeiterion for a performance. The infrastructure is not properly sized, or vented for the number of individuals that can go through the bathrooms in a single day leading to unwanted and sometimes obnoxious odors. Working with the City of New Bedford to provide construction labor and with in-kind building supply contributors, new bathrooms could be built in the space between The Z and parking garage.

4. Sound Upgrades: \$350,000

A new sound system would allow us to have industry-standard sound and equipment for all of our shows, and would also alleviate our current need to rent equipment for all of our musical acts. This would allow us to also have top of the line sound for ALL Zeiterion performances and not just the music acts taking all of our shows to the next level. We will always continue to bring in additional gear or backline, but this would alleviate \$20-\$25K per year that we currently spend on equipment rentals.

5. Video Projection: \$60,000

Video Projection and Screens: We currently spend more than \$10,000 each year to rent a projector. Owning a projector would allow us to cover our shows and allow us to rent it out to other theater users as well as increase programming options. It is possible this could be financed over five years at roughly the same cost we currently spend. Video is becoming a more requested item with shows that come through the Zeiterion, it is likely that this request will be going up in coming years as more venues have projectors in their inventories for touring productions to use.

6. Lighting Upgrades: \$200,000

New LED stage lighting fixtures: Technology is changing and it is only a matter of time before lamps will be more expensive and harder to find. It would also save on electricity because LED's use much less electricity than conventional lighting fixtures. LED lighting is just starting to become requested/expected in riders from touring productions. Being ahead of this curve would place the Zeiterion in a favorable position when it comes to lighting requests from touring companies.

7. Soft Goods (Curtains): \$25,000

New Legs, New Borders, New Middle Traveler: Most of the current soft goods are upwards of 20-30 years old and are starting to dry out due to age and use. We need to replace all of our soft goods to IFR (Inherently Flame Retardant) where possible which will not require reapplying of fire retardant every 5 years.

8. Pit Cover: \$40,000

Current pit cover is old, deteriorating and extremely heavy. A new Wenger pit cover/extension would allow us to gain more space downstage of the proscenium as well as space house right and house left of the proscenium. It would also include stairs that would be a part of the pit cover instead of an attached afterthought. The new pit cover would also be safer because it will be built out of aluminum and be anchored into the stage as opposed to our current pit cover, which is not anchored to the stage but rather braced up to it.

9. Reserve Fund: \$100,000

To strengthen the financial stability of The Z, a portion of the capital campaign will be used to establish a reserve fund. In addition, annual operating budget savings in equipment rental costs realized by the purchase of the new equipment above will be added to the reserve fund.