Tina Packer Playhouse from the Rose Garden Theatre, photo by Zachary de Silva
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Introduction and Rationale

In February 2018, the Board of Trustees and administration of Shakespeare & Company in Lenox, Massachusetts, convened to chart a course of action for the Company’s future.

The resulting three-year strategic plan from this initial gathering, presented here, provides a framework for actionable steps that will guide the Company in its mission of performance, education, and training programs of irrefutable quality. This plan embodies the Company’s intention to solidify its financial footing, pursue innovative artistic projects; serve the public in compelling and meaningful ways; maximize the potential of a unique and multi-faceted campus; and fulfill a commitment to universal inclusiveness.

As one of the world’s foremost producers of the work of William Shakespeare and other playwrights, immersive and groundbreaking education experiences, and outstanding actor training, Shakespeare & Company is supported by an enthusiastic and dedicated Board, artists, and staff. The arrival of new artistic and executive leadership in 2017, coupled with continually strengthening box-office returns, contributed income, and Board recruitment has ignited a renewed sense of purpose among Company stakeholders. The successful execution of this strategic plan will mean that Shakespeare & Company will have the resources to make bold decisions, and allow the Company to continue to steward successive generations of patronage for live theatre and arts education.
Organization Mission, Vision and History

The mission of Shakespeare & Company is to deliver a sustainable and vital program of Performance, Training, and Education, integrated for the deepened experience of the artists, the audience, and the community; and rooted in Shakespeare’s work and the Elizabethan ideals of inquiry, balance, and harmony.

The Company’s vision is to be recognized globally as a creator and facilitator of unparalleled theatre, arts education, and training that fundamentally illuminate what being human means.

Founded in 1978 by Tina Packer and a unique team of fellow artists, Shakespeare & Company is one of the leading theatre festivals of the world, offering productions of Shakespeare and other playwrights, as well as many other public events throughout the year. During its main season between May and September the Company welcomes more than 40,000 audience members to at least three Shakespeare plays staged with attention to clarity of thought and storytelling, as well as contemporary works portraying themes of social and political importance, and other public events. Productions are held in the Tina Packer Playhouse, the Elayne P. Bernstein Theatre, and the outdoor Roman Garden Theatre on the Company’s 33-acre campus, as well as outdoors at The Dell at The Mount, Edith Wharton Estate, the Company’s original home. Throughout its storied history, Shakespeare & Company has engaged celebrated actors, directors, designers, and playwrights while also providing a platform to help emerging artists hone their skills.

Education is a priority. Each year, more than 50,000 students and teachers immerse themselves in the language of Shakespeare through age- and level-appropriate programs, such as the Fall Festival of Shakespeare, the Northeast Regional Tour of Shakespeare, Shakespeare in the Courts, and Riotous Youth as well as school-based workshops and residencies that engage participants in ways that are personally meaningful, educationally inspiring, and theatrically compelling. The Company’s work in arts education has been recognized with the Massachusetts Cultural Council’s Commonwealth Award, the Coming Up Taller Award given by the White House, and other honors.
Finally, Shakespeare & Company offers one of the world’s most extensive and sought-after actor training programs. The programs of the Center for Actor Training are designed for actors, directors, education artists, writers, and managers at all stages of their careers as they learn to develop a common vocabulary and coherent approach to performing Shakespeare’s plays. Aspiring to bring their talents, intuitions, and spirits to a higher level, participants from across the globe travel to Lenox and locations around the country to work with a renowned faculty to train their voices and bodies, and delve into their imaginations, intellect, and emotions to connect more deeply with Shakespeare’s texts and characters.

Since its founding, Shakespeare & Company has been vital to the Berkshire region’s cultural, economic, and civic ecology. Firmly established within a globally recognized cultural corridor of artistic leaders, not only in theatre, but also in music, dance, the visual arts, and more, the Company continues to be a leader in the region’s growth and development, especially as the Berkshires become an increasingly popular destination to visit, and also positions itself as a desirable area to work and live.

The impact of Shakespeare & Company is felt locally by audiences who attend illuminating productions of Shakespeare and incisive contemporary plays; by students who enthusiastically participate in uniquely engaging programs; and by businesses that benefit from the Company’s capacity to attract countless visitors to the region; and globally through the countless actors who seek out Shakespeare & Company for unique and career-altering training. This strategic plan will ensure that the Company continues to forge a path to even greater artistic distinction, community partnership, and civic engagement.
Plan Organization

The strategic plan is organized around six categories: performance, education, training, finance, development, and property. Individually, the objectives of each category are functionally indispensable. In unison, they foster the Company’s ability to perform at an ambitious and increasingly optimal level. The plan also serves as a springboard, recognizing that some of the objectives described here will require more than three years to fulfill.

The six categories reach across all areas of Company operation. Many of the objectives overlap among categories, underlying their universality towards common goals of financial stability, artistic innovation, property enhancement, and community engagement. In addition, each category reinforces the Company’s commitment to increasing diversity, inclusion, equity, and access in all areas of its work, and to ensuring that the campus itself remains a welcoming atmosphere of accessibility, connectivity, responsiveness to people of all ages, backgrounds, interests, and experiences. As part of this ongoing effort, the Company has already begun to invest in cultural competency training for both fulltime and season staff, as well as the Board of Trustees, artists, and volunteers.

The fulfillment of each category of the plan is steered by a committee of members of the Shakespeare & Company Board of Trustees and senior staff. Committees meet periodically to review and update goals, as well as develop and implement specific plans of action. Some of the activities detailed in each of the strategic categories predate the preparation of this document.
Individual Category Reports

The following details the underlying objectives and indicators of success of each of the six strategic categories.

Performance

Present the most insightful, engaging, and thought-provoking productions by securing acting, directing, and writing to continue to raise the Company’s profile as a premiere venue for productions of Shakespeare and other playwrights in the world and an exceptional national theatre destination.

Synthesize the collective knowledge of the Company’s work into an artistic phenomenon that grows with consistent resonance and impact for all who experience it.

- Broaden the scope of the Company’s reach by ensuring new work is not merely tested in Lenox, but proven on a larger stage, including in New York City.
- Present the most insightful, engaging, and thought-provoking productions allowed by Company resources, without compromise to artistic quality, including through the identification of new and unique talent, and risk-taking consistent with the desire to maintain the historic strength of the Company’s earned revenue and identify new revenue streams.
- Begin to position the campus as a laboratory for new work, and the cultivation of a new generation of playwrights.

- In keeping with the region’s strong tradition as a place where writers have flourished, identify the components to establish a regular commissioning program to ensure the ongoing creation of new work and collaborations.
- Reinforce the integration of performance, education, and training by illustrating the impact of each area on the success of another throughout the company; ensure reciprocal support.

Expand the Company’s artistic reach and exposure across multiple platforms.

- Garner more attention from national media outlets to raise familiarity with our work and increase attendance.
• Enhance the Company website with current digital tools, including responsiveness; maximize engagement both through search engine optimization and robust content.

• Attract, engage, and delight customers across every transaction from ticket purchase to performance attendance.

• Establish long term and mutually beneficial partnerships with surrounding cities, including Pittsfield, North Adams, Springfield, and Hudson, because of their proximity and diverse population.

Consider and incorporate a diversity of voices
• Ensure representation, through artistic selections, of a diverse and inclusive body of thought and performance

• Continue to engage the most qualified actors, directors, and designers, and provide the resources to help them excel in their work.

• Engage the widest possible audience.

Indicators of Success
• Recognition as a destination that encourages curiosity about the theatre in general (and Shakespeare in particular), as well as a stand-alone destination for discovery and enrichment.

• Demonstrate a consistent pattern of new-work development and commissioning.

• Transfer new plays from the campus to New York City and other major markets.

• Demonstrate consistent ticket sales growth, not only as a reflection of high artistic quality, but also as measured by ease of ticket purchase from live, phone-based, and online transactions.

• Attraction of an increasingly diverse pool of high quality artists, including actors, designers, directors, and writers, to enhance and expand the Company’s existing talent.

• Develop activities that address needs of neighboring communities.
Education

Broaden the depth of talent, breadth of programming, and range of outreach, while simultaneously identifying opportunities to replicate, package, distribute, and monetize education and training initiatives.

Expand the reach, depth, and breadth of education and training programs.

• Provide the requisite personnel and physical space for this.

Further and formally replicate the Fall Festival of Shakespeare, throughout the Commonwealth, while exploring the potential for national and global replication.

• Determine how replication can benefit Shakespeare & Company not just in reputation and/or scope, but also monetarily.

• Determine the rationale, value, and processes for obtaining intellectual property protection of the Fall Festival.

• Package and distribute the Fall Festival as the Company's intellectual property.

Expand and enhance Professional Development Teacher Training.

• Offer Teacher Training, not only on campus, but also in Boston, New York and Chicago where the Company already has a presence through Artist Training.

• Utilize Professional Development for teachers as a conduit to enrolling in longer, more in-depth training programs on campus, as well as a path towards Fall Festival expansion.

• Develop senior training artists and codify teaching tools

Update the Education and Training areas of the Company website.

• Announce Fall Festival expansion plans, and actively recruit.

• Create and upload compelling content, including in-depth video about the Fall Festival described by key program leaders.

• Set and display the costs associated with bringing Shakespeare & Company trained Education Artists to schools and theatres interested in Teacher Training, along with the cost to audit Fall Festival director training.

Indicators of Success

• Increase national exposure and attention to both Fall Festival and Teacher Training opportunities

• Take comprehensive steps to trademark and monetize both.

• The creation of additional opportunities to monetize the intellectual property of the Education department
Training

Maintain world-class status of the Center for Actor Training, retaining the most qualified faculty, and ensuring the widest and most diverse applicant pool possible has knowledge of and access to the specialized programs thereof.

Expand the reach, depth, and breadth of the Center of Actor Training

- Enhance the promotion and dissemination of training programs.
- Reach a wider audience through more, specialized, and targeted marketing by developing a comprehensive marketing plan and increasing the Center’s digital and print marketing content.
- Build year-round administrative support in the Training office.
- Develop a catalogue of specialized workshops for universities, corporate leadership, and more.

Establish the Dennis Krausnick Fellowship Fund.

- Raise money to provide an endowment for minority actors and actors from war-torn countries to participate in actor training programs on scholarship.

Develop a more dependable alumni network and database to more effectively communicate value of actor training.

- Create an easily accessible and comprehensive alumni database that can ultimately serve as a conduit to help Training alumni stay connected to one another and to the Company, as well as help promote workshops and increase brand awareness.

Finetune the Weekend Intensive Model

- Increase and train faculty available to teach the Weekend Intensives.
- Continue to develop a model of scheduling Weekend Intensives in cities where Training alumni can help with promotion.
- Increase the number of Weekend Intensives to at least 20 per year.

Indicators of Success

- Continue the Company’s recognized leadership in the worldwide dissemination of best practices in the interpretation and performance of Shakespeare.
- Increase financial assistance to those who demonstrate need.
- Increase diversity of faculty and applicant pool.
- Increase alumni engagement.
Finance

Achieve greater financial stability through the development of a cash reserve of at least $500,000 and mortgage restoration fund of at least $150,000; and enhance the continuous and responsible fiscal management of the Company.

Strengthen the financial viability of the Company.

- Establish a fund totaling at least $650,000, of which at least $500,000 will be allocated as an internal borrowing mechanism—to be replenished regularly—during periods of lower revenue, and of which $150,000 will be earmarked for the restoration of the mortgage reserve.
- Cultivate new and existing revenue streams to achieve a 50/50 balance between the Company’s earned and contributed income.

Enter the “quiet phase” of a capital campaign to raise funds to pay off the mortgage and meet long-term campus enhancement goals.

- Work with the other Board committees and senior leadership to develop campaign size and scope.
- Rebalance mortgage obligations to reduce or eliminate principal debt.

Indicators of Success

- Quantitatively, fulfill the cash/working capital reserve fund, and the complete elimination of historically accumulated debt.
- Continue the Company’s current trend of financial responsibility and fiscal control to be better positioned to approach Board members and potential principal donors with greater confidence to invest in major capital projects.
- Demonstrate quantitative progress towards an even split between earned and contributed income.
- Create new revenue streams.
Development

Raise increased funds for Shakespeare & Company, including providing for the aforementioned cash reserve, and eventually achieving a 50/50 split between earned and contributed income for annual operations (while maintaining a minimum earned income of $1,000,000).

Identify and raise funds for the Company by working directly with the development department, other Company staff, and the Board of Trustees to meet annual contributed income objectives.

Increase returns on existing fundraising activities by:

- Utilizing donor screening and other fundraising research tools to broaden prospect pool and strategically track donor behavior for increased ROI.
- Increase annual minimum giving requirement among Board members, either through personal giving or gifts solicited on Company’s behalf.

Implement new, collaboratively develop strategies, including the creation of:

- Cash/working capital reserve
- Mortgage Fund
- The Company’s first formalized planned giving campaign

Provide leadership, expertise, and advice to position Shakespeare & Company for ongoing fiscal stability, artistic achievement, and international prominence.

Ensure, through increased fundraising activities, that the Company has the resources to expand its visibility, and pursue innovative artistic projects.

Indicators of Success

- Secure in excess of $650,000 in reserve funds, while simultaneously demonstrating progress towards achieving a 50/50 contributed/earned revenue split through the acquisition of new donors and increased income across every category of fundraising from individuals to foundations to planned giving.
- Continue growth of Board of Trustees, building on the recent success of having appointed seven new Board members, and increased the Company’s access to relevant in-kind professional services, including legal and real estate expertise.
Property

Determine the best use of our property to address Company needs and community interests in ways that fulfill the Company’s three core components—performance, education, and training—and create and embark on a plan to execute it.

Solidify Board commitment on a detailed plan for the best use of the property—including its potential partial or whole sale—that incorporates community interests and needs that mutually benefit the Company and the community.

- Determine how the property can support the Company to achieve its vision.
- Determine the improvements and investments needed to achieve a competitive advantage as a Berkshire destination.
- Identify the funds for a plan of execution to demolish or repurpose some of the dilapidated or condemned buildings or sell or lease the property.
- Open paths of communication with community leaders, educators, government representatives, and volunteers.

Propose solutions to solve Company (and town) housing shortages.

- Determine the feasibility and cost of constructing affordable, market rate, and artist housing on the property.
- Calculate the payback period and revenue potential of any potential housing.

Monetize the property

- Through the support of a Kuehn grant, determine the feasibility of developing new construction, including housing, on the property.

Indicators of Success

- Secure Board approval of a well-researched and prioritized plan outlining the opportunities and challenges related to the beautification and monetization of the property.
- Form mutually beneficial and strategic partnerships, including with the town of Lenox and other government agencies with an interest in increasing affordable housing.
- Form mutually beneficial partnerships with peer organizations to provide artist housing.
- Ensure that the campus is a welcoming place, not only for performances, but all types of programming throughout the year.
Conclusion

Since its founding more than 40 years ago, Shakespeare & Company has been at the vanguard of performance, education, and training. The Company rightly celebrates its past achievements, but also looks ahead to an even more promising future. Reversing a historic trend of financial instability is imperative, but doing so successfully will depend on deliberate planning and thoughtful execution of many steps across all areas of the Company’s operations. The goals outlined in this plan, like the art Shakespeare produces, are meant to be understood viscerally, but are also meant to inspire the Board of Trustees, Company staff, community members, and others much more holistically.