

Raising the Curtain

A Guide to the Art of
Presenting for Young Audiences



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Presenting for Young Audiences

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PROLOGUE



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Design by Kathe Gray/electric pear

Prologue gratefully acknowledges the funding support
of the Province of Ontario through the Ontario Arts
Council, The City of Toronto through the Toronto Arts
Council and The Canada Council for the Arts.



**THE ONTARIO
TRILLIUM
FOUNDATION**

Raising The Curtain is made possible through the
generous funding of The Ontario Trillium Foundation,
an agency of the Ministry of Culture. With \$100
million in annual funding from the province's
charitable gaming initiative, the Foundation provides
grants to eligible charitable and not for profit
organizations in the arts, culture, sports, recreation,
environment and social service agencies.

Contents

Introduction

Entertainment 4 Kidz @ The Rock

CHAPTER 1 Presenting 9

CHAPTER 2 Setting Your Programme 11

CHAPTER 3 Budgeting 15

CHAPTER 4 Sponsorships 19

CHAPTER 5 Grants 23

CHAPTER 6 Volunteers 24

CHAPTER 7 Selling Your Shows 28

CHAPTER 8 Promotion 35

CHAPTER 9 Risk Management 40

CHAPTER 10 Looking to the Future 43

CHAPTER 11 Succession 45

CHAPTER 12 Resources 47

Appendices

Introduction

Welcome to the world of presenting! Although we hope that you will return to this manual for new ideas or as a reminder of forgotten ideas, it is primarily geared to volunteers new to the art of presenting for young audiences. Included in *Raising The Curtain* are many ideas and suggestions to help you have a positive and successful season.

When you begin to present you are joining a group of people – professional and volunteer – who believe that their communities are better for having professional artists come to perform in them. Your work becomes a legacy for your community and you will receive a great deal of satisfaction from what you do. You will have the extraordinary opportunity to introduce your community to some of the finest artists in the world and most of these will be Canadian.

Prologue to the Performing Arts is a valuable resource as you embark on planning a performance series for your community. For over 37 years, we have worked with schools and community groups across Ontario (and Canada) to arrange performances by a wonderful and diverse roster of professional artists and companies. We believe that every child should have the opportunity to experience the best in the performing arts and we will work with you to ensure that this happens.

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So, Raise the Curtain on the performing arts in your community and enjoy the show!



Susan Habkirk
Prologue to the Performing Arts



Cheryl Ewing
*Brava! Special Events and Arts
Management*

Entertainment 4 Kidz @ The Rock

(Red Rock, Ontario)

Entertainment 4 Kidz @ The Rock began in January of 2000 as a spin-off of the newly formed Live From the Rock Blues and Folk Society, when we realized there was a possibility of bringing live children's entertainment to our small Northwestern Ontario community of Red Rock. A local business sponsored a free children's concert by Aengus Finnan, a folk singer. There was a great turnout at this show, and we took the opportunity to poll our audience. There appeared to be great support for live children's entertainment, so we obtained sponsorships from a number of local businesses and organizations, applied for an OAC grant, and booked our first season with the assistance of Prologue to the Performing Arts and The Ontario Trillium Foundation. Each season's series consists of four shows of a variety of artistic disciplines, such as theatre, dance, and music. We are currently finishing our third season, and look forward to continuing to bring quality live children's entertainment to Red Rock and the surrounding area.

The mandate of Entertainment 4 Kidz @ the Rock is to provide quality live entertainment for children and their families at an affordable cost close to home. We try to bring a variety of artistic experiences to challenge our audience, including music, dance, and theatre. We serve the small and relatively remote communities of the North Shore of Lake Superior, including Red Rock, Nipigon, Dorion, and Hurkett. Without these affordably priced local shows, many of the children would never see a live show. It is an hour's drive to the nearest city (Thunder Bay), and adding the cost of gas and food to the price of a concert ticket makes it a prohibitively expensive outing for many families.

Our objective is to contribute to an understanding and appreciation of the arts, and we are doing this by exposing children and their parents to a wide variety of artists. There are few other opportunities for exposure to culture in our sports-centred community. We have brought world-class musicians, dancers, and actors to our stage and consequently also to our schools, where they reach an even wider audience. We have introduced our audience to musical theatre, to performers who work on stilts and those who do bicycle stunts. Singers, drummers, mime artists, and clowns from across Canada have provided us with superb entertainment.

Our vision is to continue to provide enriching performances to the children of Red Rock and the surrounding area at an early age. We like to challenge our audience by including something in our concert series that they might never think of attending otherwise. Some of the innovative performances seem designed to expand the minds of both young and old.

We provide a service to the relatively remote communities of the North Shore of Lake Superior, including Red Rock, Nipigon, Dorion, and Hurkett. We are part of a link of Northwestern Ontario communities that take advantage of block booking to bring artists to our area to the benefit of all, and we provide a venue for artists to demonstrate their work.

Not only are we part of a regional partnership to bring artists to the area, we have very close ties to our local municipality. We have collaborated with Live From the Rock Blues and Folk Society, as sometimes they bring performers to the community who are able to provide a children's show. In August of 2003, Entertainment 4 Kidz at the Rock contributed to the children's area of the Live From the Rock Folk Festival. We work closely with area elementary schools. We have also been instrumental in setting up a number of workshops at all five of the area elementary schools, which would not have been possible had the performers not been in town for a E4K show.

The past two years we have scheduled a show as part of Red Rock's Winter Carnival. As a result of our collaboration with the Recreation Centre, we were recipients of a Parks and Recreation Ontario PRO award in 2001. We work closely with the local high school. Students needing volunteer hours help out at our shows. The Nip-Rock Performing Arts Society allows us to use their equipment and the Nip-Rock High School allows us the use of the gymnasium and stage, mats, and chairs for our shows

The local inn gives us discounted rooms for the performers and several other local businesses have been very generous with continuing in-kind donations. Entertainment 4 Kidz @ the Rock is truly a community-supported organization.

Unfortunately, the small population of this area makes it impossible to make our endeavour financially self-supporting based on ticket revenues. There are a limited number of local businesses and organizations we can ask for support (although a number of these have been very generous with their support), so we must depend on government and other funding such as Ontario Arts Council and The Ontario Trillium Foundation, to continue this worthwhile effort.

Entertainment 4 Kidz @ The Rock is hopeful that our children's concert series will be entertaining families for years to come.

Bobbi Weichers

Chair, Entertainment 4 Kidz @ The Rock

CHAPTER 1 Presenting

Presenting is the act of bringing artist and audience together.

The presenting field is very exciting. It is a mix of volunteer and professionals with a common goal – bringing artists into their communities. You may be surprised to discover that the majority of presenters are volunteers and that the professional presenters value these volunteers. Touring in Ontario would not be possible without this mix and as a result a new presenter will find others eager to help them succeed.

As a presenter you have an opportunity to leave a legacy for your community. A well-run series should outlast the founder. You can do this through developing good practices, maintaining a history and including others in your planning stages.

Many in the performing arts will talk about the first live performance they saw and how that changed their life. Particularly as a young audience presenter, you will have an impact on the lives of your audience. This can be a very uplifting thing – to stand in your venue and watch families enjoying the performance that you were instrumental in bringing to them.

Finally, remember that the best presenters are also curators – they challenge their audiences by exposing them to new and unfamiliar artists. They guide their audiences through the rich artistic offerings in the province and country, and help them to discover the unfamiliar, as well as the favourites.

Getting Started

Find some like-minded people to help you. It helps to share the workload and also puts you in a good position if you decide that you want to formalize your organization. Few of us want to invest in something that will not continue on after us and



Sarah Donald, Courtenay Dobbie and Andrew McNee in *Broccoli & Butterflies*, an **Axis Theatre Company** production

PHOTO: DAVID COOPER

having a committee helping you is the first step in making certain that the series will continue past your commitment.

What to think about:

- A mandate: Why do you want to do this? Who do you want to benefit?
- Finances: Set up a bank account.
- Contact information: At minimum you will want a telephone number and address – this can be your home number but you will want to put something in place to make certain messages don't get mislaid. It is useful to have a fax number and e-mail address.
- A brand: How will people recognize your information? A recognizable logo used on all your materials will help to establish a presence in your community.
- Type of organization: Are you going to do it alone? Do you want to become a not-for-profit giving you the opportunity to apply for grants? (Why would you consider not-for-profit status? It gives the organization a clear legal status. The board of directors and members will have limited financial liability. It also helps in raising funds privately as well as through grants. Many granting organizations require not-for-profit status.)

What are your responsibilities as a presenter?

- Know your community.
- Know what type of entertainment will appeal to them and what are people willing to pay for a ticket.
- Negotiate fairly with artists.
- Be clear in your expectations & honest in what you can provide.

Resource books

The Ontario Ministry of Consumer and Business Services (Companies Branch) has a very useful *Not-for-Profit Incorporations Handbook*, visit www.cbcs.org/osbw.

Not-for-profit

organization: A group of people working together to achieve a purpose other than personal monetary gain.

Often you can receive granting assistance to help cover your costs. CCI, Ontario's Presenting Network, manages a granting programme called Fresh Start that will consider applications asking for this assistance: www.ccio.on.ca.

You are not alone. It is easy to be overwhelmed by the amount of information you feel you lack as a presenter, but there are people and organizations who want you to succeed and are ready to offer suggestions, guidance or just a listening ear. Remember, that although you may be alone in your community, in the performing arts community you are one of many. Do not hesitate to ask for advice or a friendly listening ear.

If you know of another series similar to your own, talk to them. Call Prologue to the Performing Arts, cc1 (Ontario's Presenting Network) or the Ontario Arts Council for suggestions of people or organizations willing to help get started. cc1 also offers Regional Meetings and professional development workshops to its members.

The steps

Generally, the performing arts season takes place between September and May. There are several steps to take before you actually even talk to the artists or their representatives: determining a venue and collecting all pertinent information about it, selecting a performance date, and setting a budget for each production.

When and where?

1. Secure a venue and learn what dates will be available to you. Ask to put holds on those you think that you may need (always have a couple of extra dates on hold in case you can't find an artist who can come when you would like).
2. Check the timing of potential competition – a hockey tournament, the Super Bowl, public holidays. Why try to compete for an audience? It is better to offer your performances at a time when people will be free to come.
3. Are there other organizations presenting within your area? When are they presenting? Do your dates complement each other? Could you work together to bring in an artist who may not be interested in a single date?



Ballet Creole bring a fusion of Caribbean and Brazilian cultures to the stage with drumming and dance

Preparing to talk to the artist

1. Know your venue:
 - a. What equipment is available to you?
 - b. How many people can you accommodate?
 - c. Is it suitable for all genres?
 - d. Is there wing space and sufficient height for dance? What is the floor made of?
 - e. How large an ensemble will fit on the stage?
 - f. Is the stage large enough to accommodate a set?
 - g. Is there a loading dock?

2. Set a budget:

Your budget will give you an idea of what you can offer artists and therefore which ones you can approach with a reasonable offer. If you have in-kind sponsors that will help you provide accommodation and hospitality or meals, you may be able to pay the artist less since they won't have to cover these costs themselves.

- a. What is your fee range?
- b. Are you willing to provide accommodation?
- c. Is transportation going to be included in the fee?
- d. Are you willing to pay for additional equipment?

Making the job easier:

- Go through the **Facility Information Sheet** on page 50 of the Appendices as a guide so you get to know your facility.
- You can also use it as a guide to prepare your own. This will be helpful for the artist, so include information only on the equipment to which you have access. If it is possible for your artists to use equipment with permission from the venue, include the necessary contact information.

Finding the artists

- Talk to other communities and ask about previous performers they have found to be very successful.
- Contact Prologue to the Performing Arts for a copy of their roster.
- Contact CC1 (Ontario's presenting network).
- Contact the Touring and Outreach Office of OAC (Ontario Arts Council) for a list of artists and their management contact information.
- Attend showcase events such as the annual Contact (through CC1) and regional Prologue showcases.
- Develop a wish list showing the type of artist you would like to include in your season as well as those that fit your requirements.
- Prepare a calendar outlining the potential dates you have available.

Talking to the artist or artist manager

Usually you will speak to a manager or agent. This will mean that all discussions will take longer as your discussions must be passed on to the artist and then back through the agent to you. Keep written and dated notes of all your discussions so that you have something that you can refer back to as negotiations advance. You will also want to have something to check against when you reach the contract stage.

Artists can usually work within your limitations but it is essential that they know what to expect before they arrive.

1. Contact the artist or their representative, introduce yourself and don't be afraid to let them know that this is your first season and you need their help to make it a success. Most managers/agents have a stake in your success – if your series is successful, another opportunity exists for their artists to perform.
2. Proceed as though you are partners not adversaries.
3. Before discussing money find out if the artist is available for any of your dates, be clear on the potential audience size and the average age of those attending.
4. Does the artist have any special needs that you may not be able to accommodate? (It is helpful to describe the venue and any limitations it presents.)
5. Ask for the fee range and don't be afraid to say that it is out of your budget – generally the artist representative will want to know what you can afford based on information such as:
 - a. Are there financial limitations for your venue? If your house has a capacity of only 150, you have limited opportunities to generate ticket revenue and this will effect the amount you can afford to pay for a fee – you should let the agent know all the details re: number of seats, ticket price, etc. At some point in negotiations you will likely be asked to reveal this information.
6. What are their needs? (Ask for an up-to-date copy of their technical rider.)
 - a. If you do not have exactly the type of equipment they are requesting, ask if your equipment will be suitable before you promise to get the name brand they want. Many are flexible and are looking for specific features rather than a name.

At this stage you can say that you cannot afford the artist. The agent may ask what you can afford and take your offer to the artist to consider. They may know that the artist will be passing through your community on the way to another city and that a paid 'stopover' would be welcome even if it is for less than the usual fee.

Making an offer

1. After having verbal discussions with the artist or their representative, send a letter or e-mail outlining your offer.
2. Be careful to include all possible aspects of the offer.
3. Is travel included in the fee? It is not uncommon to negotiate an amount to cover travel costs. This will avoid any unpleasant surprises such as an artist arriving with a travel bill far beyond what your budget can pay.
4. Are you providing accommodation or is that also included in the fee? Many presenters are able to work out a deal for accommodation. Hotels realize that the artist will likely spend money beyond the room charge, so at minimum will give you a discount in return for recognition as a sponsor.

The rider: the section of the contract that outlines the equipment, hospitality and accommodation needs of the artists. Often the equipment needs are out of date or do not reflect the type of performance you are requesting. Ask for a copy of the rider and go through it carefully so that you know what you are committing to and make certain you have discussed any discrepancies.

5. Have you agreed to cover additional technical costs or are you expecting that to be included in your offer? Be clear. The rider is part of the contract. You have the right to withhold any element as long as both parties have agreed to it. Talk to the artist representative and let them know that you cannot provide certain equipment or that what you have available is similar. If you agree both parties should initial the changes to show their agreement.
6. Are there any additional costs that you should expect such as SOCAN fees (paid by the presenter) or GST (paid to the artist or their representative – you will need their GST number)?

The offer is accepted

1. A contract should now be issued, generally this is done by the artist or their representative.
2. Read the contract carefully to make certain that it reflects your previous discussions.
3. Many new presenters think that they have to provide everything in the rider – you have the right to strike anything that you cannot provide or is not part of the original agreement.
4. Remember to initial any changes and return the contract to the artist representative.
5. Include a letter outlining the changes you have made and requesting that the artist representative also initial any changes signifying agreement.
6. Don't hesitate to contact the artist or their representative if you have questions or concerns.

SOCAN (The Society of Composers, Authors and Music Publishers of Canada, www.socan.ca) will provide you with a schedule for the fees you must pay for any performance involving music. This is the agency that makes certain that composers receive financial recognition for the use of their music. It is a minimal fee based on a percentage of ticket sales or a flat rate for free performances.

Budgeting for a performing arts series is no different than budgeting for any other purpose – using your experience and some standard assumptions, you set your targets for your expenses and revenues.

The following breakdown is based on a fairly standard budget used when requesting grants. Using it as a guide will be helpful as you develop your series and perhaps look into making grant requests.

Expenses are generally divided into four areas:

- Artistic costs (including fees, travel, accommodation, hospitality)
- Production (including venue rental, lights, sound, custodial staff, ushers)
- Marketing (ads, promotional items, printing, photocopies)
- Administration (phone, office supplies, anything not directly covered by the above)

Revenues include:

- Government grants (federal, provincial, regional, municipal)
- Private fundraising (foundations, special events, sponsorships)
- Generated revenue (ticket/subscription sales, merchandise sales)



Maderaz Latin Music
performs music from
Central and South America

Questions to consider before beginning

- **Will you sell by subscription only?**

Advantages: this gives you guaranteed revenue no matter what the weather. Subscription sales also come early in your season giving you a guide for future spending.



Theatre Direct addresses an issue facing young people today in the production *I Met A Bully On A Hill*. Generally, established series base their ticket revenue on a 60% house. In your beginning years, you may wish to work on a 30% to 40% basis.

A separate spreadsheet should be kept for subscription revenues and expenses. The final subscription figures will then be divided and applied to each performance within the series. See the sample in the Appendices, page 54.

Disadvantages: People may hesitate to make a large financial commitment until they have developed a relationship with your series, and know what to expect. They are more likely to make a small commitment to start and then embrace you wholeheartedly.

- **Single tickets only?**

Advantages: Families have only to make a small financial commitment. (They can ‘try out’ your product before committing to the entire series.)

Disadvantages: Patrons may wait to purchase at the time of the performance. This means that in bad weather they may not make the effort to attend.

- **Combined subscription and single ticket sales?**

Advantages: Subscriptions go on sale first, guaranteeing purchasers a place at the performances. Single tickets are sold as available. This allows you to introduce potential subscribers to your series and maintain growth, as you will always be faced with families growing out of your series and the need to keep bringing in new patrons. You can offer special ticket sales to encourage new patrons to try you out.

Determining ticket prices

How do you set your ticket/subscription prices?

There is no magic formula, setting ticket prices becomes easier with experience as you learn what your community is willing to pay. In the first years you are making an educated guess by considering several factors:

- Fees charged for other activities in your community
- Talking to other young audience presenters in neighbouring and similar communities
- What would you be willing to pay for tickets?
- Talking to other families with young children
- What is the likely ratio of adults to children?

If you have a financial software programme, you can set a formula that will assist you in determining what your community can bear. Then all you have to do is change the number of tickets and/or the price of each ticket and your total will adjust. It is a good idea to design your budget so that you are recording your actuals on the same page as your projections so that you can easily see where you met your targets. This information is very helpful in designing future budgets. The first year is always the most difficult as much of your budget will be based on guesses.

	Projected					Actual				
	# of tickets	x	price/ticket	=	total	# of tickets	x	price/ticket	=	total
Adults	5	x	10	=	50		x		=	
Children	7	x	5	=	35		x		=	
Total	12				85					

You want to encourage subscription sales. Why? Subscription sales put money in your hands earlier to help cover expenses. They are not weather dependent. Low subscription sales are an indicator that helps you determine how to spend your marketing dollars. Do you need to do extra marketing or are you sold out so you can save some marketing costs?

Assumptions can get you into trouble! “Our series sold out last year so we know that it will again this year” is one example. Unless you continue to build your audiences, drawing new patrons, you are putting off a reality – some day your audience will be less. We all lose patrons due to relocation and aging.

Marketing should be 10-30% of your overall budget.

Administration costs should be somewhere in the 10-15% range. Your largest expense will be the artist fees.

Don't forget to include **insurance** – liability and director's insurance.

Not-for-profit does not mean that your organization must break even every year. It means that the organization will use any profits for the continued benefit of the organization. It is not unusual for not-for-profits to build a reserve fund for contingencies.

Setting your budget

Once you have decided what you can expect for ticket revenue you can begin to develop your budget. List everything that you may have to pay for – including things that you expect to cover through in-kind sponsorships. Next, list every source of income you believe you have a good chance of achieving – this includes in-kind sponsorships, grants, ticket revenue, fundraising and concessions. Compare your totals. Generally you will find that you will not have enough revenue. If you do discover a shortfall you will need to review your expenses to see if you can cut costs or identify items that may be obtained through an in-kind sponsorship (materials or services provided at no cost in return for recognition as a sponsor). It is tempting to immediately cut the marketing budget. Be careful: if you can't tell people about your series you will not sell as many tickets as you need to in order to cover your costs.

It is tempting to begin by adjusting your expected ticket revenue to a higher figure. As with all budgets it is better to underestimate your revenue and overestimate your expenses. This will allow for the unexpected without putting your entire series at risk.

In-kind donations can often make the difference between success and failure. It is important that you be able to look at your budget and identify which items were covered by a donation. Someday you may have to begin paying for these items and it is helpful to know what you used in the past and how important it is to continue doing things the same way. If you have to pay for all your printing, do you need as many copies as you might use if they are free!

Making your budget work for you

- Have someone check your figures, or your formulas if you worked with a computer spreadsheet.
- Follow it and be prepared to explain why you made changes during the year.
- Have expenses outside of the budget authorized so all will know why additional money is being spent.
- Keep good records – including the value of in-kind donations.
- Keep in-kind donations as a separate section in both revenue and expenses. (Under expenses, you will find it helpful to label each item as marketing, printing, photocopying, etc.)

Your budget pages are more than a financial tool. They can help you determine future programming by helping you see which performers or types of shows attracted larger audiences.

The support of local businesses helps to cover the shortfall between your ticket revenue and your expenses. This support is usually in the form of a sponsorship.

Many not-for-profits and business owners are confused about what a sponsorship involves and how it differs from a donation. It is important to understand the relationship because Revenue Canada has been looking very closely at business donations and sponsorships. How to know the difference? Just ask yourself one question. Will we be giving exposure to this company through putting their logo on our poster or in the programme, providing free tickets, or giving a discount on a programme ad? If your answer is yes, then you are describing a sponsorship. If the company is giving you dollars and will receive nothing in return, then it is a donation. Tax receipts can be given for donations, not sponsorships.

In-kind sponsorships are those where services are given rather than dollars. It is easy to forget that these can be just as valuable to you as a cash sponsorship and sometimes we forget to give appropriate recognition. In determining the value you need to consider whether you would normally use the item or service. If you would use it and it is essential to your success then give it full market value. If the item or service helps but is not necessary, then take 50% of the market value and finally, if it is not very useful then you either gracefully refuse the offer or you give it no value. Most in-kind donations come in at 50% of their value.

A company that allows you to photocopy your flyers for free should be given full value for the photocopying. How to determine that value? Keep accurate records and use the previous year's totals as a guide for the upcoming. You can usually find a public photocopier in town and use their fee per copy as your base cost per



Members of **CORPUS Dance Projects** in a production of **A Flock of Flyers**

PHOTOGRAPHER: GARY MULCAHEY

page. If you are beginning a series, estimate the number of photocopies you would need and multiply it by the base number.

Allowing the relationship to develop

A large sponsor may take up to 18 months to woo. First you target them and learn all that you can about the corporation so that you can identify that they are a good fit for you. Have they demonstrated interest in the community? Interest in the arts? Do you know someone within the corporation who can help you prepare a request that will be of interest to the person in charge of community giving?

Once you have identified a possible sponsor, you can begin developing a relationship with them.

- Call and have a short conversation with the appropriate contact to confirm that there may be some interest in your proposal.
- Send in a proposal that includes a short history of your organization and outlines your request and the benefits that the company can expect in return for its support.
- Follow up with a phone call to make certain that the package was received and that there are no questions. Try to set up an appointment to discuss the proposal in more detail. If the company does not wish to have a meeting at this time, ask when you should call back to check on progress.

If they say no; it is fair to ask why. Some companies target areas of support. Usually you will be told this during your initial phone conversation. Be certain to ask how often they review their priorities. It could be that they would be willing to consider your proposal in another year. If they have no budget left, ask when would be the best time to submit a proposal in the future. If you sense that there may be support if your programme was more familiar, then invite key people from the organization to attend some of your performances. Assign an enthusiastic volunteer to introduce the potential sponsor to your series pointing out the number of families enjoying your series or other things you do that contribute to the community.

Sponsors like to be kept up to date on your progress. If you produce a newsletter, add your sponsors to your mailing list. If not, send them updates announcing your successes, include quotes from your patrons, sharing notice of your activities. You want your sponsor to be an active partner. This not only leads to continued and maybe even greater support but may result in unexpected help. Sponsors are sometimes brought on board by other sponsors.

Sponsorships are a method by which a business can write off the cost of supporting a not-for-profit by using dollars from a marketing budget.

Donations come from a donations budget. The business receives a tax receipt and cannot receive public recognition in the form of ads, use of their logo or other items that will give the company exposure.

The value given to the in-kind sponsorship is directly related to its market value and the needs of your organization.

Whenever possible, ask your in-kind sponsor to give you an invoice that shows the value of the goods or services and then cancels this out as a sponsor. This is a very helpful budget tool and increasingly, granting agencies will give you credit for this kind of donation.

What to give in return for sponsorship?

Be careful when determining what a sponsor will receive for their support. You do not want to promise anything that will cost you. Do they want to hold a reception? Great as long as they arrange it and cover all the costs.

The common items exchanged in a sponsorship are:

Tickets We all feel good when we can give something of value away. Tickets to a sponsor represent an opportunity to reward an employee or thank a good client. They are very valuable and you should treat them as such. Remember that every ticket you give away is one that you can't sell.

Signage If you promise to display a banner it should be clear that the sponsor will provide that banner. If you are concerned about all the banners looking the same and you want to produce them, then make certain that the appropriate amount is included in the amount you will receive. If banners would cost you \$250 to produce, a \$2,000 sponsorship would actually cost \$2,250.

Ad space Start with the number of programmes you are going to produce for each performance and the cost to produce each. What will it cost to add four pages? Remember that each additional page actually means you have to fill four pages or you will have an odd sheet. Once you have figured out the cost then you can begin establishing a pricing structure. You need to know this before you start giving away space. Can you afford to give away a full page or will you have to sell three more to cover that gift?

Use of logo in print materials It is only fair that the largest sponsors receive the greatest profile. Sit down and consider what you have to offer: logo on posters, on brochures, tickets, verbal acknowledgements, banners, other signage. In each case you want to consider the number produced, the distribution of each item and the number of people likely to see the logo. This will help you determine the value of each. Now, sit down and determine how much you would like to receive before giving each item away.

The sponsor relationship can be very rewarding but it does require a lot of work to develop and maintain. Keeping good records, staying in touch and taking pride in what you do will help.



Creole Drummatrix fuse contemporary popular songs with African and Caribbean rhythms

Generally a good rule of thumb when offering tickets is to give up to 10% of the value of the sponsorship.

When putting together any print documents, remember that you must think in "4". One sheet of paper results in four pages. This means that it is not as simple as just adding a page to accommodate another ad – if you want your programme to look professional, you need to fill three additional pages.

When setting a rate for your ads, you need to consider the cost of producing the piece and what is the norm in your community.

Resource books

Burk, Penelope. *Thanks! A Guide to Donor-Centred Fundraising* (Burlington: Burk & Associates Ltd., 2000)

If you can only afford one book, this is the one! Although meant for fundraising, the concepts can be applied to almost anything you do and it is based on research conducted with Canadian donors and charities.

Johnston, Michael. *Direct Response Fund Raising: Mastering New Trends for Results* (Toronto: John Wiley & Sons, Inc., 2000).

This book uses a number of Canadian examples. Although you may feel that your organization will never be large enough to run direct mail campaigns, it is worth looking at as it will give you ideas and may suggest to you that this is an effective way to raise funds.

Young, Joyce and Ken Wyman. *Fundraising for Non-Profit Groups* (Vancouver: Self-Counsel Press, 1996).

Ken Wyman is a Canadian fundraising guru and any of his books are well worth the investment. This is a good refresher for the experienced fundraiser as well as a guide for those new to it.

Sponsors can help you build your series by talking to others. Don't stop at the receipt for their financial support. Work with them to find ways that you can benefit each other. Suggest that they buy tickets and use them to give to a favourite cause to be used as a gift, prize or auction item.

Not-for-profit status does not mean that you can give out charitable tax receipts. This requires an application for **charitable status** that is quite time-consuming. Charitable status applications must meet the requirements of the Public Trustee. Contact: Office of the Public Trustee for the Province of Ontario Charities Division, 145 Queen Street West, Toronto.

Government funding can be a mixed blessing. Any additional funding source helps because it is very unlikely that you will be able to pay for your series through ticket sales. However, being dependent on government support means that you are at the whim of political change. The best advice is to not become completely dependent on any one source of funding.

Most granting agencies require you to have a formal organization, a registered not-for-profit. However, the Ontario Arts Council and Ontario's Presenting Network (CC1) can give you information on grants for which you will qualify. Both are eager to help develop new presenters. As your organization matures, you may find that you qualify for assistance from the Department of Canadian Heritage.

No matter which grant you want to access, you will find that there is help available. Granting agencies generally have consultants they want you to work with. Although it is natural to look at consultants as an enemy – since they can be instrumental in approving your application – it is important that you remember that the submission of a good grant application also looks good on the consultant. They are in touch with the current political climate and are happy to help shape your application. They truly do want you to succeed; their help and advice is invaluable.

Spend time considering each question and determine what they really want to know. Answer specifically. Review the completed application form and make certain that you have included all elements (including all necessary signatures), made as many copies as required, balanced your budget and signed and dated the form.

A successful grant application does not finish with the arrival of the cheque. Generally you will have to sign a letter of agreement that outlines the expectations of the granting agency. This will include the appropriate recognition to be given as well as how the grant can be spent. Usually the agency will hold back a portion of your grant until you submit a final report. In this report you will outline how you used the grant, what worked, what didn't and how the grant helped you advance your organization. Don't be afraid to say that the outcome was not what you expected – granting agencies understand that the best plans may not work. It is better to try to understand why it didn't and to outline what you would do differently. Before submitting the report, carefully review your letter of agreement again and make certain that you have fulfilled the expectations of the granting agency.

As in any search for financial support, you need to allow a six to nine month turnaround time.

Applying for grants can be very time consuming but a valuable exercise even if not successful. They help you to clarify your objectives and programming and with a little practice you will find that you can cut and paste different elements together to meet the needs of any granting agency. Good financial records are a must.

Granting agencies will not accept applications after the closing date nor for activities that have already taken place. Take special note of when the application is due and whether a postmark on that date is acceptable.



Musician **Chris McKhool** (centre) enlivens his energetic musical performances with tales of his travels around the world

Part of your long-term success as a presenter will depend on the volunteers that you attract. You will want people to work on your committee as well as those who will help on performance days. Although it may seem easier to simply do everything yourself, volunteers help in a number of ways, not the least being ambassadors for the series. It is always nice to have someone to celebrate success with you or to share those times that do not go as well as you had hoped.

Remember, volunteers will:

- Work tirelessly on your behalf
- Talk about your organization within the community and thus increase your ticket sales, and improve your fund-raising and audience development efforts
- Encourage friends to get involved
- Support you financially and with their time and enthusiasm
- Bring energy and commitment
- Help get new projects and programmes underway
- Take great pride in your organization
- Be your strongest supporter and your most effective critic

It is important to take the time to choose people in whom you have confidence. Although it is easiest to start with people you already know, there are likely others in your community who have skills that you need. Take the time to develop a job description and take everyone, even your friends, through an interview and an orientation. This shows that you are serious about what you are doing and you expect them to be committed to the series.

Designing job descriptions

1. Consider what needs to be or could be done
2. Analyze the tasks including level of commitment, responsibility and amount of training required.
3. Write job descriptions that clearly outline everything expected.

Once you have job descriptions you will have a better idea of what skills you need to fill out your committee. This will help you decide where to recruit volunteers. Do you need someone with an accounting or business background? Put up a flyer somewhere to reach retired business people. Looking for graphic design? You might find a student with an interest in this area and eager to fill out their resume with experience.

Recruitment

Word of mouth is the most effective way to recruit – many come because their friends tell them of the opportunity. Consider:

- Friends, family – let them know that you are looking for people, can they suggest anyone?
- Displays and sign-up booths (don't forget to include these during special events)
- Articles in your local papers talking about the series and the possibility of involvement as a volunteer
- Corporations – many encourage their employees to get involved in the community, if this is the case, they will likely help you to recruit
- Volunteer Centre – a good place to find retired people looking for a chance to contribute
- Flyers
- Approaching service clubs is also a good way to find business people to help
- Posters
- Displays at libraries, shopping malls, office complexes
- Participating in a Volunteers' Fair

All of the above have the added benefit of helping you to market your series!

Interviews

The interview is a chance for you to tell someone else about your organization while discovering whether they would be a good fit for you. Do they have the skills, interest, energy that you are looking for? It is helpful to be able to suggest

For a sample **Volunteer Application Form**, see page 56 of the Appendices.

For a sample **Job Description**, see page 57 of the Appendices.

Take your time when inviting people to join your committee. You want people with different viewpoints while sharing a common goal.

other organizations if the interview indicates that this individual does not have the skills you need.

The interview also allows you to determine how they want to contribute. Do they want to gain new skills? Are they interested only in sharing the skills they have? Are there jobs that they will be unhappy doing? Some volunteers are very happy coming in and stuffing envelopes. Others will do it once and refuse to return again.

Being clear on what each of you is expecting will make the relationship more successful. You may also find that their expectations don't match yours and that it might be better if you don't work together at this time.

Police screening

This is a procedure that is becoming the norm for anyone who is going to be working with cash and/or children. There is a cost involved, generally around \$20. The individual must go to the police for the screening and bring back the report to you. It is unlikely that you will need to go through this process for a performing arts series where children are accompanied by parents or guardians. If you are going to include any activities such as a workshop or school performance, you will want to include the procedure as part of your recruitment.

Orientation and training

Orientation can be done over a cup of coffee. You will want to outline the series and what you hope to accomplish as well as give your volunteer a job description. If you have produced any marketing or sponsorship materials it would be helpful to include them in an orientation binder you give the volunteer. Those who are helping just on the days of performances will not need as much material or this kind of orientation. You might just want them to show up a half hour earlier on the day of performance to go through their duties.

When it doesn't work out

You can fire a volunteer – although this is a very hard thing to do. To make it a little easier you should develop a way to deal with conflicts. If you know what steps to take if a volunteer is not working out, you should be able to alleviate some of the problem. It might be as simple as finding a new job for them. In extreme cases you may have to ask them to leave the organization. If you have to take this step, announce that the individual is retiring and recognize them for their contributions. It is important to treat them with dignity and respect. Taking time to interview volunteers before 'hiring' them will help you avoid this kind of situation.

It is becoming the norm for any organization involved with children to require their volunteers to go for police checks. It is one of the tools you use to keep children safe. No tool is foolproof however, so never depend on the results of a police check alone.

A quick and easy reference guide for volunteers is to print out their key responsibilities as well as any contact numbers they might need to refer to in an emergency and attach them to a pocket-sized reference card or the back of their name tag.

It is unlikely that volunteers will read an orientation manual so go through the key points and show them where they can find information that they may require.

Motivation

The most effective motivation for a volunteer often costs the organization little or nothing. Recognition of their commitment, personal and written thank you's, birthday cards, increased opportunities and a job well done are often enough. It is essential to track the length of commitment so that volunteers can be rewarded as they reach milestones.

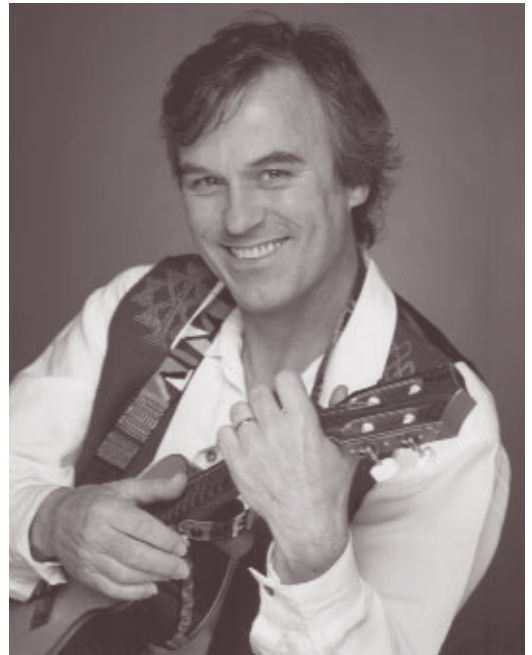
Record-keeping

This is an essential part of volunteer management. You will refer to your records for recognition, in the case of conflicts (has this volunteer had problems relating with others in the past?), for grant requests (how many volunteers and the number of hours contributed is becoming a standard query in grant applications) and to help evaluate your programme.

When calculating the dollar value of a volunteer's time, the rule of thumb has been minimum wage.

Resource books

Hall, Michael. *Caring Canadians, Involved Canadians: Highlights from the 2000 National Survey of Giving, Volunteering and Participating* (Statistics Canada, 2001). It is helpful to understand the role of volunteers in today's society and this publication gives you that snapshot.



Jack Grunsky's interactive performance features songs, rhythms, rhyhmes and chants

Plan for the future.
Decide on a means
of encouraging
movement through your
organization. How do
you decide that someone
is ready to take on a
planning role? When
and how do you decide
that someone should
leave the committee?

Never ask a volunteer to
do something that you
are not prepared to do
yourself.



Faustwork Mask

Theatre uses monologue, physical comedy and an assortment of nearly twenty handcrafted masks in their production of *The Mask Messenger*

A successful series is dependent on the selling of tickets, individually or as part of a series. The only way to be successful is by letting your potential audience know about the performances. We often budget without considering what resources we really need in order to market effectively. We set a budget, with the intent of using whatever is left for marketing. To make our marketing work for us, we should determine what we would like to do, set priorities and then determine what each aspect will cost. You can then make choices based on what you can afford.

To best plan your marketing strategy you need to understand the various terms connected to marketing.

Marketing The entire picture. The materials and activities used to tell people about your series. Included in your marketing plan will be advertising, promotions and publicity.

Advertising Anything that is purchased through the media – paid newspaper ads, radio or tv ads. This also includes ad space that is ‘given’ to your organization as an in-kind donation.

Promotions Everything else you do to tell people about your series such as flyers, posters, and brochures.

Publicity Anything you do that gets people talking about your activities. A story in your local paper about the need for volunteers is also publicity for the series.

Target Market The audience you want to attract to your performances, therefore allowing you to focus your energies and resources.

Co-operative Marketing Two or more organizations working together to share the cost.

Customer Service Keep your new patrons coming back. It is cheaper and easier to have returning patrons than it is to get new ones. Besides, they will work for you – telling others what a great job you are doing and bringing in new patrons.

Branding Finding a way to make information about your series readily identifiable, generally through the use of a logo, or series' name.

Developing a marketing strategy

1. Determine who you want to reach and what message you wish to give them. Set a measurable goal; i.e., We will persuade 50% of parents with young families in our community that our series is the best way to spend quality time with their children. How many tickets will this mean?
2. Develop a calendar outlining when and where you'll place your ads. This will serve as a basis for your budget. You will make adjustments as you determine costs and what you can really afford to do.
3. Determine your tools:
 - a. As in other areas, your community will help you to determine what marketing tools would be most effective. Does your community have a poster board where everyone goes for information?
 - b. It is also important that you have a plan to distribute each item. Can you distribute flyers/brochures through your school system?
 - c. The ideal is to plan for just as many items as you know you can distribute. You will also want a small number for your archives (6) as well as for packages you will be preparing for sponsors in the next season.
4. Develop your budget.
 - a. Find out what each proposed ad/item will cost.
 - i. Remember that sometimes you can get a cheaper rate per ad when you are placing several. In the case of print materials there is often a 'break point' where the unit cost becomes cheaper. This is a saving only if you can afford the overall cost and have a plan to use the pieces.
 - ii. When asking for quotes, be certain to give each supplier the same information so that you can fairly compare their responses. For print materials you need to be specific about paper, colour and number of folds.
 - iii. When budgeting you want to include a contingency to allow you to spend more if sales do not reach your targets.
5. It is fair to choose to go with a higher quote because you will receive intangibles that are important to you; i.e., the print company will come to your door to pick up and deliver your materials

"We don't need to market ourselves. Our series sold out last year so we know that it will again this year." Remember, you are not only marketing for this year but also for the future.

Keep a perspective! If your community consists of 100 families with children in the age range you want to attract, it isn't sensible to expect to fill a hall that holds 600 people! It would be great to have 60 families in your audience. Set realistic targets that reflect your community.

Distribution

Pay attention to what seems to work in your community. Are there bulletin boards where you can post a flyer? Do people stop and look at posters? Talking to people who will be in your target audience will help you decide the best way to spend your budget. The following chart will give you some ideas of approaches that you might use.

Print	Broadcast	Others
Magazines	Radio	Newsletters
Newspapers	Cable TV	Novelties
Yellow pages	TV	Telephone sales
Tabloids		Direct mail
Industrial directories		Posters
Trade journals		Transit
		Web
		Bulletin boards
		Point of purchase (where your tickets are sold or businesses that cater to the same target market)
		Out of home media (billboards, things you see outside your home)

Don't forget other community organizations! Working together is better for everyone as you work to reach a similar audience by trading ads in each other's programmes, stuffing flyers in each others' mailings or programmes and sharing the cost of paid advertising. Co-operative marketing is very common in the business world.

Marketing calendar

Keeping the distribution list in mind begin designing your campaign. It is useful to have the following charts as your basis. The first chart shows when things need to be done, the second the cost of each.

With respect to your marketing plan: does it make sense? Have you allowed enough time to get the word out for the marketing of the series/individual performances? Should you get the posters out earlier? Will the direct mailing be effective during the month of August or would you be better off waiting until the first week of school?

Although many organizations cannot afford radio or tv ad campaigns, they have

People react to different things – keep this in mind when designing your strategy and plan for a variety of methods to get your message out.

It is more important to have several well-placed posters than a large amount sitting in a box. Produce only as many items as you have a plan to distribute.

been included because it is possible to run Public Service Announcements (PSAs). The number of times a PSA will run is dependent on the relationship you have with the broadcaster and the number of events running at the same time as yours.

Marketing Plan				
	Print	Broadcast	Direct Mail	Material Distribution
Aug. 15			brochures to post office	
Aug. 30				
Sept. 1	subscription ad to run			production of posters
Sept. 15				posters distributed
Sept. 30		radio public service announcements run		
Oct. 7	first newspaper story	radio public service announcements run		
Oct. 15	first performance of the series			

ABOVE: A sample marketing plan for a series, first performance on October 15.

If the marketing plan seems to make sense to you, take the time to figure out what each aspect is going to cost and set up a worksheet so that you can see and monitor your marketing expenses. You may want to make more changes based the results of this exercise.

Some questions to consider: Can you save money on posters if you print fewer and find volunteers to distribute them? Does the cost for each make sense when you consider the reach of the ad? If you save money on printing extra brochures can you use that to buy a radio ad that will run three weeks for \$400? Is there a possibility of setting up a sponsorship?

Remember you are not just comparing the cost, you need to also consider the number of people you are reaching and whether the method is the best one to reach your audience. It is more important that you choose one medium and design a good campaign based on it, than it is to try to advertise in all. You will also have opportunities to place PSAs on broadcast media and event listings in print.

Marketing should be at least 10% of your overall budget. You can do a lot with volunteer resources to assist in getting the word out but don't forget that they need materials to distribute. The marketing budget is often the first to be cut when trying to balance a budget. Remember, without marketing, how will people know to buy tickets?

Keep in mind that print media is always being asked to give free advertising space. You will often get greater 'free' coverage if you place the occasional ad.

	Marketing Expenses				
	Print	Broadcast	Direct Mail	Material Distribution	Total to date
Aug. 15			\$300		\$300
Aug. 30					
Sept. 1	\$140				\$440
Sept. 15					
Sept. 30				\$500	\$940
Oct. 1					
Oct. 15					
Total Budget	\$140		\$300	\$500	\$940

Now consider:

- Have you designed a plan that allows you to reach as many people as possible at least once?
- Have you designed a plan that has a high probability of reaching people more than once in different ways?

If you make any changes during the year, be certain to record the change on your plan and note whether it seemed to be effective so that the process is easier in the future or for the next volunteer. You also need to record the size, frequency and cost of individual ads in attached notes.

Measuring marketing effectiveness

Were you successful? Did your message get to the right people?

Audience surveys can be very useful in helping you determine how your marketing dollars are best spent. You not only want to know how they found out about your series, but what do they read and listen to and watch. You may find that your most effective ads are the PSAs run on your local cable station. Besides, audiences like to be asked what they think.

We seldom act on something the first time we see or hear about it. Look for ways to bring your message to your target audience at least three times.

Production of print materials:

Spend time looking at examples produced by others. What do you like? What does not appeal to you. This will help you explain to your graphic designer what you want and save you both a lot of aggravation.

What to include: It is surprisingly easy to neglect to include key information such as dates and times! Prepare a checklist of all the information that must be included in each piece. No matter how experienced you are, refer to the list to make certain that you will not be surprised after the item is printed. Have a member of your committee also look at the materials before sending it to print. A final check is to have someone not directly connected with your series confirm that your information is clear.

Talking to media advertisers

If you have any budget money for paid advertising you will want to get the most that you can for your dollars because we never have enough. Meet with an advertising representative and remember that because they do want to sell you advertising they are likely willing to work with you to help you get the best deal. As a community group there should be a special rate – in radio it is often two ads for the price of one. Papers will give you a line rate that is cheaper. Ask the sales representative to explain everything and don't be afraid to ask questions. Consider that a 15-second radio ad run more frequently may do you more good than a longer one. The media are required to supply public service announcements to all community service groups.

A small ad in your local paper may result in a large story. This is one of the reasons we try to include some paid advertising in our budgets so that we can leverage what we spend into something more.

In radio, it is also possible to find a company willing to cover the cost of your ad for the promise of a tag line stating “brought to you by Car Shop”. The ad representative may help you identify businesses willing to do this.

Useful terms when discussing advertising

CPM (Cost per Thousand) the cost of reaching one thousand people over a set schedule of ads.

Audience/Circulation The people you will reach with your ad – radio and tv call it audience, newspapers call it circulation.

Reach and frequency refers to the total number of people who see or hear an ad at least once during a set time period while frequency is the average number of times these people see or hear the ad.



Kahurangi Maori Dance
Theatre bring the legends and culture of New Zealand to their audiences

To catch those spelling errors, it helps to read your work backwards. This way you are concentrating on the individual word, not the sentence.

No one wants to buy an ad in their local newspaper. They want a story. Since everyone feels this way you can get an edge by talking to the editor and let him or her know that you are willing to buy an ad if you can get additional coverage.

Flighting the running of a bunch of ads in a short time.

Pass-along Readership An estimate made by many tabloids and magazines of the number of people that read their publication. There is no way of knowing whether their estimate is accurate so it can be safely ignored when comparing circulation.

PSA (Public Service Announcements) Essentially event listings announced on tv and radio at no cost to your organization.

Tear Sheet A page from a newspaper or magazine as proof of where and when the ad ran.

Resource books

Bangs Jr., David H. *The Market Planning Guide*, 5th Edition (Chicago: Upstart Publishing Company, 1998).

Although aimed at businesses, the theory is the same and this guide takes the reader through a series of questions that help you design an effective marketing campaign.

Grobman, Gary M. *The Nonprofit Organization's Guide to E-Commerce* (Pennsylvania: White Hat Communications, 2001).

Although geared to the American market and therefore some of the tax and legal suggestions do not apply to Canadians, the tips and sidebars in this book offer an interesting look at what can be done with the Internet as a marketing tool.

Many of the tools you use in marketing to your audience can also be used to market to potential donors and sponsors.

Don't be discouraged by the lack of budget to cover marketing your series. For many not-for-profits the most important aspect, and often the most fun, is the promotional and publicity work that you do. This is the area in which your imagination and creativity can have huge payoffs.

Your promotion materials include posters, flyers, bookmarks, stickers and brochures – items you pay to have produced. Your publicity items are the things you do to attract attention – participating in community parades, having stories printed in your local paper.

When you are developing a written marketing campaign, as discussed in the marketing chapter, you should include the promotional and publicity activities. Each supports the other so you want to make certain that you have considered the timing and cost of each. Remember that promotional activities will be free for your audience but will often cost your organization some money and time. As your season progresses you will continue to refer back to this marketing plan. It is not only a guideline for you, it also serves as a reminder of what you have done and will help you determine what has been most effective.

Things to keep in mind:

- Ads will be most effective in the week immediately preceding the performance.
- Posters are not generally effective more than three weeks before.
- You design your season so that the first and last performances are very exciting. This is a good time to encourage people to renew or purchase subscriptions.

You will find that you have lots of opportunities to give tickets away and this can be a very successful way to promote your series if you are careful to keep things under control. Take some time to set a policy for giving away complimentary tickets. Pair this with a way of recording where they have gone and tracking the success of your giveaways. If you are continually giving tickets away and the recipients never come to a performance then why are you giving them tickets?



William Orlowski,
Canada's premiere tap
dance artist, uses his feet
not only as the instruments
of music, but also as the
voice of a story

So how to use complimentary tickets to your benefit?

- Attract media attention: having trouble getting your local media on board? Invite them to performances, introduce them to the performers and volunteers and help give them a story.
- Introduce potential volunteers/board members to your programme: thinking of inviting someone to join your committee but don't know how to attract them? Invite them to a performance so they can see for themselves how valuable this is for your community.
- Reward volunteers/patrons: this is a great way to thank a volunteer or to give credit for the commitment given by your committee members.
- Attract new audience members: used carefully as outlined above, free tickets can be a good way to attract new audience members. Has a new family moved into your community? What better way to introduce them to one of the benefits of living in your community than to give them the gift of a performance. Make certain that you include information on upcoming shows, subscription, etc., and try to be available to answer questions and to introduce them to others.

It takes at least three different reminders for someone to actually go out and purchase their tickets.

Your tickets are valuable. Giving them away without care and thought results in a community that does not value your work.

What seems to be a small change to us can create hours of work for a graphic designer. Take the time to make certain the copy (text) you give to the designer has been checked and does not have errors. Once the copy goes to the designer you should not be making changes.

Preparing your promotional materials

Allow yourself time to gather all your materials together, write your copy, think about it, have others read it for errors and clarity and make changes before you give it to your designer. This will save a lot of headaches in the end. It is also wise to have a checklist, so that you are certain that everything that must be included has been. Even experienced organizations have discovered a missing phone number or incorrect date after their piece has gone to print! It is especially valuable to have someone who doesn't know the details read your piece. This person will point out missing details that you didn't catch because you are so familiar with the series.

Working with your designer

Most professional graphic designers have allowed for a limited number of major changes and a few minor ones when they give a quote for their work. It is just as important to respect the time of a volunteer and the following guidelines will help you make most effective use of a volunteer's time and thus lead to an enjoyable working relationship.

1. The copy should be proofed and include all the necessary information before going to a graphic designer.
2. Have someone who is not part of the committee read the brochure to make certain that all necessary information is included, accurate and clear.
3. It is useful to keep a checklist handy to remind you of critical information to be included; i.e., sponsors, dates, times, box office numbers.

4. Prepare a mockup to assist the designer in determining where you want key information to be located.
5. Give the designer the information once you are certain it is accurate.
6. Keep in mind that a designer is prepared to make minor changes, it takes a lot of their time to ask them to make major changes such as replacing blocks of copy.
7. Check again that the brochure is correct before going to printer.
8. Printer's proof – you are checking to make certain that the colour is correct, that nothing is missing, that the look of the piece is as it should be.

How do you decide what items you should print? Talk to your friends and to other organizations in your community. If you don't see posters, is that because other organizations have found that no one pays attention? It could also be that at one time the number of posters became overwhelming and they were no longer effective. If no one is using them, they may now become a good marketing tool for you. Unfortunately marketing is often done by trial and error. You have to talk to your audience to discover what got their attention.

Attracting your audience

Keeping in mind that it will take three 'hits' to get someone's attention, you may want to consider including the following items in your plans.

- An advance piece – a short flyer, or postcard letting people know that they should be looking for more information, a newspaper story or radio interview.
- A brochure with detailed information including how to order tickets, a story or radio interview talking about the actual series.
- A follow-up – a poster for each performance, bookmarks outlining individual performances or the whole series, ads or stories in the paper featuring the artists or particular performance.

The distribution of each is dependent on the timing of your series but there are some guidelines that will help you decide what will work for you. Assuming that you are following the usual performance season of September to May, avoid the summer if possible. It is such a short season that your potential audience will not want to be thinking about what they will be doing in the winter! The first couple of weeks in September are also a difficult time to get people's attention as families try to get back into a routine. You can plan for your advance work to go out late spring – during your season, plan to make the last performance special and include the announcement of the next season. Your brochures can go out just before summer and again first thing in the fall. Be certain that anyone who has expressed an interest in your series or attended a single performance but has not taken out a subscription gets a follow-up brochure or flyer. They may have been interested but

The more familiar you are with the material in your promotional material, the more likely you are to miss an error such as an incorrect phone number or even a misspelling of your own name!

Give your designer a checklist of things that must appear in the brochure. Do you want a half page for a letter from the Mayor? Include it on the checklist. This helps the designer decide on the layout. An alternative or supplement is to sketch out how you want things to appear – a mockup of the finished work.

not motivated enough to buy their subscription and you want to give them every opportunity to do so. Finally, your third hit should start about three weeks before a performance. This is the reminder that time is getting short for those who haven't bought their tickets yet. It is also a reason to generate excitement in those who are planning to go. If they talk about the performance to friends they are helping you market the performance.

Attracting the media

How to get the media to take interest? Talk to them. Enlist their help. Ask them what you can do to make it easier for them to cover your activities. Sometimes it can be as simple as providing a colour photo. You will also want to write a strong press release so that it makes the reporter's job easier.

Remember your teacher telling you that a good story includes who, what, where, why and how? That is what you need in a press release. This key information should appear in the first paragraph and repeated in the last one so it doesn't get missed.

- At the top of your page you will include "Media Release" followed by the date that the information can be printed – usually immediately.
- You then title your story and try to get all the pertinent information within a single page.
- For ease of reading you should use at least 1.5 spacing between the lines.
- At the end of the information that can be broadcast or printed place –30– in the middle of the page. This tells the media that any information following is not for release. This includes the name and contact information of the person able to answer any of their questions.

A sample release has been included in the Appendices, page 53.

Although we tend to think of the arts section for our releases, often they would serve us better if the story appeared in the local section. If you can think of a local twist to your story, include it and make certain that a copy goes to the appropriate department. Always follow up with a phone call to make certain that it was received. The media receives a huge number of releases and it is easy to get lost in the pile. It is also worthwhile to talk to the key people that you want to get to read your material. Ask them how they want to receive a media release. The editor of a small community paper once said that he would pay more attention to one that was delivered by hand because broadcast faxes had become so common.

PSAs or Public Service Announcements are also an excellent way to get the word out. All the media must carry PSAs. Take the time to check with each to see how they want to receive the information. Some have a specific format they want you to follow and you are more likely to receive coverage if you take the time to

The media is required to support community organizations. Most do this through event listings. If you want more profile then you have to work with them. Find out what it would take to get a profile story and a picture, or a live interview. Look for ways to make your series newsworthy. Is there a local connection? Is the timing appropriate because a theme in the performance relates to something happening in your community now?

respect their wishes. All will give only the basic information so they serve more as a reminder than as a selling tool but we all need reminders so don't ignore them.

In general a PSA looks like this:

A Great Play
Nov. 2, 2003
2:30 p.m.
Anytime Theatre
22 Address St.
999.234.5164

Let your creativity go wild with publicity ideas. What are your performances about? Is there something special that you could create that would fit with any of them? A little bit of money can go a long way with a piece that you create to generate interest—just remember to include the key information. Bookmarks are cheap and easy to create and most bookstores are happy to include them with purchases. One of your resources is the artist and the artist's management. They may have ideas that have worked in other communities. You may also be able to negotiate a public appearance or workshop depending on the date of other appearances. They are usually happy to help out with an interview. This can be done by phone in the week or two prior to their appearance.

Working with other communities bringing in the same artist may help you stretch your ideas and budget. To produce a small giveaway is cheaper if there are large numbers so talk to other presenters if you think you have a good idea but are not certain you can do it alone. Look for opportunities within your community to get involved and to tell others about your performances. We are all bombarded daily with information so you have to continue working to get yours noticed.

Resource books

Sullivan, K.D. *Go Ahead...Proof it!* (New York: Barron's Educational Series Inc., 1996).

A personal favourite, this guide will not only help you to proofread your work, but will give you ideas for avoiding some of the common mistakes made in preparing your work.

Williams, Robin. *The Non-Designer's Design Book* (Berkeley: Peachpit Press, 1994). With computers we all think we can design. This book will help you avoid the major pitfalls if you have to do it yourself. If you can work with someone, it will prepare you to understand the design choices and better determine whether they are appropriate to the message you want to send to your community.

Whenever the Red Rock Series presents a show based on a children's book, they purchase copies of the book to give to the school libraries.



Robert Munsch's story *A Promise is a Promise* is transformed onto stage by the deft puppetry of **Rag and Bone Puppet Theatre**

You have the venue, you have booked the artists, the marketing is in place and people have begun to buy their tickets. Now you can breathe easier. Well, not quite. It is an important stop to think about the things that can go wrong and put plans in place for dealing with them. Many of us believe that it is enough to buy insurance, but that is only the first step in making certain that you have a healthy organization.

Protecting yourself means that you have considered not only your audience, but also your volunteers and your reputation. It can be just as difficult to recover from negative publicity as a financial loss. Taking a bit of time to consider your activities and imagining the worse that can happen will provide you with a map to guide you through a process that will make it manageable.

The steps You will take a look at everything that might happen, determine which things you can deal with immediately and which ones will require more time or resources than you currently have. This is an ongoing process, you will deal with the things you can change now and continue to work on items as they become higher in your priority list.

Identification As a group, write down all the things you can imagine that could possibly go wrong. Consider weather, money, accidents, volunteers – everything you can think of. Don't worry about whether it is likely or not, that is the next step.

Evaluation You want to start setting priorities. As you look at each item you will realize that some are very unlikely to happen – such as a tornado striking your building. Others are more likely – such as someone tripping over the carpet entering the building.

It is very easy to look at this list and feel paralysis! How can we deal with all of these things? You can't. At least, not all at once. Now you are going to decide which

should be a priority. The chart below is part of a larger one (see the Appendices, page 59 for the full chart). The columns included are the ones you want to work with at this point in your discussions.

Risk Management Assessment Chart					
Consequence x Likelihood=Risk 1=Low, 3=Medium, 5=High					
Identification	Associated Risk(s)	Persons at Risk	C	L	R
Someone trips on loose carpet	Injury	Audience, performers, volunteers	3	5	15
Tornado hits the venue during a concert	Loss of building, possible loss of life	Audience, performers, volunteers	5	1	5

Using the examples suggested above you can see that the tornado, although the consequences would be dire, is not likely to happen. It is more likely that someone will trip on a loose carpet. Doing something about the carpet then becomes the first priority. You will actually be working with a very long list but the sorting does help and you will find that the list becomes manageable. Now you can start dealing with each item in an order that makes sense. Do as many as you can but if you can't find solutions for everything that is okay. This is something you will return to on an annual basis at minimum.

Finding solutions

Expect to be surprised. Often the solutions are relatively easy. In the example being used you may decide to remove the carpet or ask that it be tacked down properly. The important thing is that you have identified a risk and determined the best way to deal with it. You have this in writing and all those involved in your organization know what to do in the case of a problem or where to go to find the appropriate way to deal with it.

Put things in place

Write a plan. This is the most important step. Your identification of potential problems is only useful if everyone knows where to find the answers. Each member of your committee should have a copy of the document and a copy should be on site and readily accessible at all of your concerts.

A good risk management plan will include:

1. A list of your expectations regarding safety and conduct.
2. Information on what to do in an emergency: include lines of communication,

Don't believe the mantra that there is no bad publicity, only good. Your organization cannot afford the potential loss of ticket sales, sponsors or grants that may come about because you have not taken the time to identify potential risks and put a plan in place to deal with them.

We tend to think of physical things going wrong in our venue but what if a snowstorm prevents your artists from arriving at your community? What would you do then?



Eric Nagler and his zany orchestra of music and merriment encourage lots of audience participation at his performances

phone numbers, who is responsible for telling whom and who will deal with the media.

3. For the volunteers: provide checklists outlining what volunteers should do when they arrive to make certain everything is safe and what to do in the case of an emergency.
4. An incident report and instructions for completing it and what to do once completed.

You may want to prepare a checklist to be used by your volunteers before every performance. Sample checklists for both box office volunteers and ushers can be found on page 58 of the Appendices. The box office is a good place to keep a phone for emergency use but remember to have the emergency numbers written down and with the phone. You don't want to depend on your memory in an emergency. The box office

is also a good place to keep incident reports – another very simple step to take to lessen your risk.

Keep the document alive

This is even more important if you rent your venue. Do you know where the fire extinguishers are? Do you know where the fire pull station is? What do you do if the breakers blow? Include contact names and numbers where appropriate.

Review the plan. Things change. Make certain that your plan is up to date and reflects those changes. In reviewing it you may also think of something else that should be included or a better solution for one that you have already identified. Go through the exercise at least once a year.

Taking the time to consider possible risks makes you more effective. Done properly you will have looked at all of your activities – programming, financial management, venue, volunteers and will be comfortable in knowing that you have done everything you can to ensure the health of your audience, performers and your organization. This leaves you free to enjoy the performances because you know that you and your volunteers are prepared.

Don't forget to check the Appendices for the **Sample Assessment Chart** and **Incident Report**. They can be found on pages 59 and 60 respectively.

The success of your series will be dependent on the work you do today to guarantee an audience for the future. This is true whether or not you are running an adult or family series. The only difference with a family series is that you know that your audience will need to be renewed as children grow older. Adult programmers often forget that they also need to continually build and renew their audiences.

When you look at your audience and your community you should see opportunity. Within your audience you likely have single ticket purchasers. How can you encourage them to become subscribers? Remember, subscribers may pay less but they provide a strong foundation for your series. You should always be looking at the community to see who you are missing as a single ticket buyer. How to attract them? This is an area where the wise use of complimentary tickets can be useful. Is there a preschool where you can offer introductory tickets at a discounted price? Maybe you know about a new mother with older children. Offering a break by giving tickets to the older siblings and a sitter would certainly be accepted with gratitude and maybe you will have planted an idea for future special times with the older children! Look at every new opportunity with the thought of turning it into a way to build your audience.

If a sponsor wants to pay for a performer to come in and give tickets to their employees, ask if you can have an opportunity to tell their employees about the rest of your series at the performance or through a flyer. Come to an agreement that you can sell any unused seats. Ideally you will have limited the number of tickets given to the sponsor so that you can sell the others in advance. You could also consider this as a special treat for your subscribers. Those who have purchased their subscription by this date will get an additional performance at no extra cost!

Although it is harder when you have a young audience series because your audience is always moving on, developing a relationship with them allows you to make riskier programming choices. Through time you will find that your audience will begin to trust your judgment because they have enjoyed your programming. The community will know that you bring in quality entertainment that their children will enjoy. By being in the audience during performances and talking to your



Robert Morgan in
Roseneath Theatre's
production of Morgan's
Journey

patrons you can learn what they are particularly interested in and how much you can stretch their experience. It has become important to some granting agencies that presenters bring in riskier programming, but trust your own judgment and be prepared to support your choices. It is easy to forget that what is considered mainstream in a large centre may be very risky in a smaller, isolated community.

Many young audience series try to bring in a well-rounded experience, offering dance, theatre, and music in each season. This is excellent programming. It is also important to look at a cycle – a series of seasons as being one family’s experience. At minimum you probably expect a family to come for three years. Keep this in mind when considering your programming. If you have an opportunity to bring in two excellent theatre pieces in a season at the expense of music, it should be okay as long as you balance your choice in the next season. You will find that many artists work on a three-year cycle. They will rotate the shows they offer with the thought that presenters will bring them in annually. In the fourth year it will be a new audience so they can return with the first show in their cycle. This is one of the things you will balance as a programmer. Favourite artists help you to sell tickets. Children love the familiar. Parents are reluctant to pay to see the same thing twice so by offering a favourite artist with a new story you are meeting the needs of both.

As a presenter you have a responsibility to two communities – your own and the larger arts community. Through bringing in quality performances and providing opportunities to experience something new or out of the ordinary you are contributing to the health of your community. In putting an organization in place so that your series will continue beyond your time with it, you are leaving a legacy. As a presenter, you are providing opportunities to artists to perform and by working within the larger touring community you are helping to maintain the health of the performing arts.

Resources

Allison, Michael & Jude Kaye. *Strategic Planning for Nonprofit Organizations: a Practical Guide and Workbook* (Toronto: John Wiley & Sons, Inc., 1997).

Very helpful in working through planning for the future, this guide provides sample worksheets, and examples of what strategic planning can do for you. Sample time frames range from one day to eight months showing that even a short session can be useful if planned carefully.

The Council for Business and the Arts in Canada. *Developing Effective Arts Boards* (Toronto).

Most of the booklets produced by The Council for Business and the Arts in Canada are worthwhile to include in your collection. Concise with an understanding of the relationship between business and the arts, they are invaluable for their insights and suggestions.

Taking the time to dream and then discuss how you would reach that dream can make it a reality. It is an excellent investment to sit down with your committee and key stakeholders and set goals and decide what you can do to reach those goals. Don’t stop with putting it in writing! Include a check against your plan at all of your meetings so you are always checking on how you are doing. This will help keep your organization alive and vital.

Just as it is in raising children, it often seems easier to just do everything yourself but in the long-term it is better to have a supportive committee in place to help you. It is more fun to share the work and, if your own life plans change and you can no longer give the same amount of time, you know that your series will continue. It is a wonderful feeling to leave this kind of legacy to your community.

Finding volunteers

There never seem to be enough volunteers. The problem is more likely that we have already approached all the ones we know and can't think of anyone else to ask. First, think about what you need a volunteer to do. Develop a job description including the amount of time you expect the job to take, how often this person would have to attend meetings, whether they have to attend performances, the special skills needed.

Now, describe the ideal person. Would it be helpful to have someone who is good with money? Do you need someone who is outgoing? This helps to narrow your search down so that you know what specific skill sets you want. You now have to figure out where to find them. It is not always necessary to find committee members with young children to work on a young audience series. There may be seniors who would love to work on a project that involves young families.

Consider:

- A new family in town
- An employee at a store that sells to the same market
- A student
- Someone in retirement

Keeping volunteers

Strangely enough, it is sometimes easier to keep volunteers when they know that they can leave at any time! A volunteer who knows that they are not completely responsible for making certain the series continues feels a sense of freedom – they know that they can miss a performance to go to an important family gathering. They are more likely to stay committed. This is one of the reasons you want to encourage a variety of volunteers to be involved. Some will give a couple of hours a month to bake cookies for your concession stand, others will give a couple of hours a week to work on marketing activities. Always try to find others to share the load.

Succession is the process by which the leadership of an organization is passed on from one person (or group of people) to another. Succession is crucial to the longevity of any not-for-profit group.

Preparing for the future

A healthy organization has turnover. Painful as it may be, this is a good thing for the organization if you have made the effort to develop volunteers. Keep an eye on those who are only marginally involved in what you are doing. Is it time to give them more responsibility? Do they seem to hang around a little bit longer than others? Is this a sign that we want to be more involved? To have volunteers working with your committee members gives them training and means that you have someone who can step into an empty position.

Forming partnerships

As you develop your series you will find opportunities to expand your network. Each of these partners will contribute to your success. Businesses are not only a source for much-needed dollars, they can also help with your costs by helping to spread the word, providing talented volunteers or in-kind services. Talk to your local school boards and schools to see how you can support each other. Arts are part of the curriculum and young children are expected to experience performances. You may be able to provide a needed service to your schools by providing artist workshops. In return, the additional fee for an artist makes your offer more attractive.

Look to other presenting organizations as a source of ideas and support. An adult series might bring in an artist that has a children's show that you could book for a lower fee while also saving on travel and accommodation costs. One of the most successful examples of presenting partnerships has been block booking. A group of presenters put together a proposed tour and make an offer to an artist. A solid week or two of work is always better than a single night even though the fee per performance may be slightly less. Ontario's Presenting Network, cci, has been built on the need to have partners to keep the touring industry alive. It is never about them and us, it is about finding a way to support what each partner needs for success. We all benefit from the desire to keep our industry healthy.

In 1997 the Canadian Association of Parks & Recreation published *The Benefits Catalogue*, a summary of why recreation, arts and culture are essential to personal, social, economic and environmental well-being. *The Catalogue* includes the results of studies conducted across North America proving that children active in the arts develop leadership, creativity and problem solving skills. Their abilities in reading, writing and math improve through the arts.

Your work as a young audience presenter will not only enhance your community, but through exposing children to the performing arts you may awaken an interest in performance leading to participation and thus set numerous children on a strong course for the future.

Letting go is very difficult but it is an essential part of leaving a legacy to your community. It is easier if you have worked with your successor and talked about what is important to you and why you made the choices that you have. They may still go in a different direction but you know that you have given them the tools to do the best job possible.

CCI (Ontario's Presenting Network)

260 Adelaide Street East, Box 47
Toronto ON M5A 1N0
T: 416.703.6709 (local)
1 (866) 209-0982 (toll-free)
F: 416.504.2418
www.ccio.on.ca

**The Canadian Centre for
Philanthropy**

425 University Avenue, Suite 700
Toronto ON M5G 1T6
T: 416.597.2293 1.800.263.1178
F: 416.597.2294
info@ccp.ca
www.ccp.ca

Canadian Conference of the Arts

804-130 Albert Street
Ottawa ON K1P 5G4
T: 613.238.3561
F: 613.238.4849
info@ccarts.ca
www.ccarts.ca

**The Council for Business and the
Arts in Canada**

165 University Avenue, Suite 705
Toronto ON M5H 3B8
T: 416.869.3016
F: 416.869.0435
info@businessforarts.org
www.businessforarts.org

Ontario Arts Council

151 Bloor Street West, 5th Floor
Toronto ON M5S 1T6
T: 416.961.1660 1.800.387.0058
F: 416.961.7796
info@arts.on.ca
www.arts.on.ca

Prologue to the Performing Arts

55 Mill Street
The Case Goods Building, Suite 201
Toronto, ON M5A 3C4
T: 416-591-9092, ext. 223
1-888-591-9092, ext. 223
F: 416-591-2023
www.prologue.org

SOCAN

41 Valleybrook Drive
Toronto ON M3B 2S6
T: 416.445.8700
1.800.557.6226
F: 416.445.7108
www.socan.ca

Volunteer Canada

330 Gilmour Street, Second Floor
Ottawa ON K2P 0P6
T: 613.231.4371 1.800.670.0401
F: 613.231.6725
info@volunteer.ca
www.volunteer.ca/volunteercanada

Appendices

Facility Information Sheet	50
Sample Press Release	53
Sample Budget	54
Sample Volunteer Form	56
Sample Job Description	57
Sample Check Lists	58
Sample Risk Assessment Chart	59
Sample Incident Report	60

Facility Information Sheet

Name of venue _____

Street Address _____

City _____

Telephone (of facility if accessible by the artists) _____

Contact name _____

Contact telephone _____

Cell phone _____

Description of venue:

1. ☐ school gym ☐ community centre ☐ other _____
2. Is it air conditioned? ☐ Yes ☐ No
3. Dressing room space (# of people, # of rooms) _____

Stage

1. Is there a stage? ☐ Yes ☐ No
Stage width _____ Stage depth _____
2. Is there wing space? ☐ Yes ☐ No
3. Is there a curtain? ☐ Yes ☐ No
How is the curtain controlled? ☐ electrically ☐ manually ☐ other

Describe the stage area:

1. How many access points from the audience to the stage?
2. Is the floor a sprung floor? ☐ Yes ☐ No
Is it covered in tile, carpet, or wood? _____
What is under the floor covering? _____
3. Is there a dance floor available? ☐ Yes ☐ No
4. What is the maximum usable floor space? _____

Describe the audience area:

1. Is the audience seating permanent? ☐ Yes ☐ No
No. of seats _____
2. Does the audience sit on the floor or on chairs?
No. of chairs _____ No. of patrons _____
3. Location of aisles (is it possible to change the location?) _____

4. Do actors have to enter through the audience to get to the stage from the dressing rooms? ☐ Yes ☐ No
5. Is the audience raked? ☐ Yes ☐ No
If yes, what is the difference in elevation. _____
6. How much space between the first row of seats and the performance area?

Parking:

1. No. of cars that can be accommodated _____
2. Distance from venue _____
3. Cost of parking, if any _____

Loading Dock:

1. Describe the approach including street names _____

Location in relation to the venue _____
2. Can a truck back directly to the door? ☐ Yes ☐ No
3. Is there a loading platform? ☐ Yes ☐ No
At ground level? ☐ Yes ☐ No
Height _____ Width _____
Distance from stage _____
4. Do you have to deal with ☐ stairs ☐ ramp ☐ elevator
☐ other _____
5. Is there storage for road boxes? ☐ Yes ☐ No

Technical information:

1. Is there a permanent lighting system? ☐ Yes ☐ No

Describe including # & type of instruments _____

2. Are there follow-spots? ☐ Yes ☐ No

Number and type _____

3. Is there a permanent sound system? ☐ Yes ☐ No

4. Is there projection equipment? ☐ Yes ☐ No

5. Is there a way for the Front of House people to contact the artists:

☐ intercom system ☐ cue light ☐ runner ☐ other _____

6. Can the show be heard via speakers in the dressing rooms? ☐ Yes ☐ No

7. Are there any restrictions on flames, flash pots, smoke effects, etc.

Emergency Information:

Location of first aid equipment _____

Phone number of nearest ambulance service _____

Phone number of nearest hospital emergency room _____

Location of nearest hospital emergency room _____

Phone number of emergency services? _____

Just in case!!

Nearest drug store to hotel _____

List of restaurants near to hotel and venue _____

Nearest hardware store _____

Nearest lumber yard _____

Nearest shopping – specialty and centres _____

Sample Press Release

MEDIA RELEASE

September 15, 2003
For Immediate Release

In 1997 the Canadian Parks/Recreation Association printed a *Benefits Catalogue* citing studies that prove the importance of recreation in our lives. Included is this statement from E. Boyer, president of the Carnegie Foundation for the Advancement of Teaching. “During the past quarter century, literally thousands of school-based programs have demonstrated beyond question that the arts can not only bring coherence to our fragmented academic world, but through the arts, students’ performance in other academic disciplines can be enhanced as well”. The Emerging Artist Series is delighted to announce that they are doing their part to expose your children to the benefits of the arts. Beginning with a performance of *Peter Pan* by Dufflebag Theatre on November 1, 2003, the EA Series will introduce children ages 3 to 10 to a variety of performances.

Over the course of their first season, EA Series will present artists in a variety of the performing arts. Your children can experience dance, puppetry, theatre and music for as little as \$5 per performance! Cheaper than renting a movie and an opportunity for the family to have a unique experience together.

Thanks to the support of local businesses – George Tire Co. and the Mining Industrial Inc. EA Series is able to offer families subscriptions at a very reasonable price of \$20 per child and \$26 for adults. Individual tickets will not go on sale until the first of October. Tickets are available at the Corner Grocery Store or by calling 123.456.7787.

Don’t miss EA Series inaugural performance of Dufflebag Theatre’s *Peter Pan* on November 1 at the Local Community Centre.

-30-

For further information contact:

Georgia Brown
Chair of Emerging Artist Series
123.456.7780

Sample Budget

Performance: _____ Date: _____

Venue: _____ Time: _____

To save some work in calculating revenue generated from box office sales, build a formula in your spreadsheet that multiplies the number of tickets by the ticket price.

BOX OFFICE	Projected				Actual	
<i>Ticket category</i>	<i># of tickets</i>	<i>x</i>	<i>price</i>	<i>revenue</i>	<i># of tickets</i>	<i>revenue</i>
Single adults	25	x	\$10.00	\$250.00	10	\$100.00
By Single children		x	\$5.00	\$0.00		\$0.00
Adult subscription		x	\$7.00	\$0.00		\$0.00
Child Subscription		x	\$3.00	\$0.00		\$0.00
Family subscription		x	\$20.00	\$0.00		\$0.00
Comp adults		x	\$0.00	\$0.00		\$0.00
Comp children		x	\$0.00	\$0.00		\$0.00
Total Box Office				\$250.00		\$100.00

*Budgeted Box Office revenue equals total of projected revenue in the chart above.

**Actual Box Office revenue equals total of actual revenue in the chart above.

REVENUE	Budget	Actual
<i>Generated Revenue</i>		
Box Office	\$250.00*	\$100.00**
Programme ads	\$250.00	\$100.00
<i>Fundraising</i>		
Donations		
Sponsorships		
Special Events	\$0.00	\$0.00
<i>Grants</i>		
Provincial		
Municipal	\$0.00	\$0.00
Total Revenue	\$250.00	\$100.00

EXPENSES	Budget	Actual
Artistic		
Artist Fees		
Travel		
Accommodation		
Hospitality		
	\$0.00	\$0.00
Marketing		
Flyers		
Posters		
Subscription costs†		
Ads		
Programme		
	\$0.00	\$0.00
Production		
Sound		
Lighting		
Venue Rental		
Staff		
	\$0.00	\$0.00
Administration		
Photocopying		
Mileage		
Conferences		
Phone		
	\$0.00	\$0.00
Total Expenses	\$0.00	\$0.00
SURPLUS (DEFICIT)	\$250.00	\$100.00

With the exception of Subscription costs, all items apply to dollars spent for the individual show only. See Subscription Budget below.

SUBSCRIPTION BUDGET	Projected	Actual
Subscription Costs		
Flyers/brochures		
Posters		
Ads		
Programme		
	\$0.00	\$0.00
COST/PERFORMANCE†		

†For subscription costs per performance, divide the total cost by the number of performances. This amount is transferred to the individual show budgets above.

Sample Volunteer Form

Personal Information		
Last Name		First Name
Street Address		City or Town
		Postal Code
Home Telephone	Day Time Telephone	E-mail address

Age: ☐ 14–15 years and accompanied by a parent/guardian
☐ 16–17 years ☐ 18 years and over

Will you require a form to be signed for high school credit? ☐ Yes ☐ No

Circle shirt size: M L XL XXL

Volunteer Interests (please check all of the tasks and times you are interested in)

Please indicate the hours per month you'd like to volunteer for: _____

What is your **first** task preference? _____

What is your **second** task preference? _____

We will try to accommodate your request as best as we can. If we are unable to, may we contact you to discuss further options? ☐ Yes ☐ No

☐ Helping at performances – 3 to 4 hours commitment

- | | | |
|----------------------------------|---|-----------------------------------|
| <input type="radio"/> Set up | <input type="radio"/> helping performers load-in | <input type="radio"/> cleaning up |
| <input type="radio"/> Box office | <input type="radio"/> helping performers load-out | <input type="radio"/> hospitality |
| <input type="radio"/> Usher | <input type="radio"/> Concessions | |

☐ Before performances – 3 to 4 hour commitment

- | | |
|---|---|
| <input type="radio"/> preparing hospitality for artists | <input type="radio"/> preparing items for concessions |
| <input type="radio"/> shopping for hospitality items | <input type="radio"/> putting up posters |

☐ Committee – 8 to 16 hour commitment monthly

- | | | |
|-----------------------------------|---------------------------------|--|
| <input type="radio"/> marketing | <input type="radio"/> financial | <input type="radio"/> programming |
| <input type="radio"/> sponsorship | <input type="radio"/> programme | <input type="radio"/> revenue generation |

Sample Job Description

Name of Position: _____

General Responsibility or Purpose: _____

Mission/objective/goal of assignment _____

Specific Responsibilities:

1. _____

2. _____

3. _____

4. _____

Directly Report to: _____

Indirectly Report to: _____

Work with: _____

Time Commitment: _____

Fiscal Responsibility: _____

Orientation: _____

Training: _____

Physical requirements: _____

Evaluation: _____

Special Benefits: _____

General Responsibility or Purpose

Use a one sentence description.

Work with

Note if the volunteer will be working with other staff or volunteers.

Time Commitment

If appropriate include time frame – when does job begin and end.

Fiscal Responsibility

Is there a budget? Who approves expenses?

Orientation and Training

If orientation and/or training are required, note how and where they will take place, and by whom they will be conducted.

Physical requirements

Note if the job requires lifting, standing for long periods, etc.

Evaluation

Indicate who will conduct evaluations, as well as when and how frequently they will occur.

Special Benefits

Do they receive out-of-pocket expenses, free parking, etc.?

Sample Check Lists

Box Office:

Before the performance:

- Check your float to see that it is correct.
- If there is anything special or unusual about the performance, make certain to let patrons know this i.e. there is a reception following the programme.
- Familiarize yourself with the venue, taking careful note of washroom location.
- Familiarize yourself with your tools, such as the use of the charge card machine.
- Do not allow the public to use the cell phone unless directed to do so by the Box Office or House Managers.
- Ask for assistance from the Box Office Manager whenever there appears to be a discrepancy in an order.

During the performance:

- Balance your cash, remove deposit and make certain that float is correct and of denominations that will be useful for the next box office staff.
- Assist with authorization of charge cards as required by the Box Office Manager.
- Make certain that the box office area is tidy and all cash is in a secure location.
- If necessary, assist with concessions during intermission.

Ushers

Before the performance:

- Meet with House Manager for instructions.
- Make certain venue is tidy and chairs in proper position.
- Tour venue to familiarize yourself with locations of washrooms, and areas of concern such as possible hazards i.e. lighting stands, cords.
- Know where the fire extinguishers are located.

During performances:

- Keep on eye on patrons within your area of responsibility in case of problems.
- At intermission, be available to patrons in case of questions or comments.
- If a patron complains of an obstructed or broken seat, assist the patron in finding a better one. Make a note and inform the House Manager.
- Pass on any comments made by patrons to the House Manager.

Following the performance:

- Assist patrons in leaving.
- Thank them for attending.
- Help clear any trash and replace seats as shown on your seat plan.

Sample Risk Assessment Chart

Location: _____

Assessment carried out by: _____

Date: _____

(HM-House Manager, AD-Artistic Director, SM-Stage Manager, CB-Chair of the board, BM-Box Office Manager, VM-Volunteer Manager, MD-Director of Marketing, BD-Board of Directors)

Consequence x Likelihood=Risk 1=Low, 3=Medium, 5=High

No.	Hazard Identification	Associated Risk(s)	Persons at Risk	Existing Controls	C	L	R	Action Required/Responsibility	Status
1.	Inspector shows up and wants to shut us down.	Negative profile for festival's future	BD, AD	BD, AD	5	1	5	Arrange for building inspector in fall to determine needs to meet code for future.	
2.	Traffic flow in and out of area.	Traffic accident	Primarily audience	Some visual	3	5	15	Clear signage erected and parking volunteers with vests and flashlights in place to direct traffic.	
3.	Loft collapses	future of festival, liability lawsuit	audience, ushers	well built	5	1	5	limited seating to be offered	
4.									
5.									
6.									
7.									
8.									
9.									
10.									
11.									
12.									

Chart adapted from one provided by Linda L. Graff

Incident Report Form

To be completed in its entirety immediately following a situation and to be given to the Your Theatre Group Coordinator as soon as possible. Please use additional pages if necessary.

Report completed by: _____

Date: _____

Event: _____

Date: _____

Time: _____

Any injuries? ☐ Yes ☐ No

Description of injuries _____

Was emergency personnel involved? ☐ Yes ☐ No

If so, who? Include names of emergency personnel if possible.

☐ Police _____

☐ Fire _____

☐ Emergency medical _____

☐ Other _____

Details of the situation: _____

Describe the incident and any injuries that resulted in as much detail as possible. If there isn't enough room on the incident report itself, use additional pieces of paper which you can then staple or paper clip to the report.

Names of those involved:

Name		
Address		
City	Province	Postal code
Home Phone	Work Phone	Fax

Name		
Address		
City	Province	Postal code
Home Phone	Work Phone	Fax

Names of Witnesses:

Name		
Address		
City	Province	Postal code
Home Phone	Work Phone	Fax

Name		
Address		
City	Province	Postal code
Home Phone	Work Phone	Fax

It is essential that you keep complete records, including the names of all people involved and all witnesses. If the number of individuals involved or the number of witnesses exceeds the space available, make sure to write all additional information on separate pages to be attached to the incident report.

Notes

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FOUNDATION

Raising The Curtain is made possible through the generous funding of The Ontario Trillium Foundation, an agency of the Ministry of Culture. With \$100 million in annual funding from the province's charitable gaming initiative, the Foundation provides grants to eligible charitable and not for profit organizations in the arts, culture, sports, recreation, environment and social service agencies.