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## IRVINE BARCLAY THEATRE OPERATING COMPANY

## An Internship Report

Submitted to the Graduate Faculty of the
University of New Orleans
in partial fulfillment of the requirement for the degree of

Master of Arts In Arts Administration

by

Lu Chen

B.A. in Arts Management Beijing Dance Academy, 2007

December 2009

For the past two years, I have grown from what I have seen and experienced here in the United States. I have learned to look at the positive, optimistic side of life when things go wrong and to put on a big smile on when having a depressing day. I feel every experience I have devoted myself to accounts for my progress and that every inch of the progress I have made reaffirms my passion for and dedication to a future in the field of arts administration.

I dedicate this report to everyone in this country who has furthered the development of the arts industry, and who has ever offered me guidance.

Lu Chen October 2009, California

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## **ABSTRACT**

The following report, which I hope will serve as a reference for future alumni and arts administrators who are interested in theatre operation and performing arts management, is based on my internship experience at the Irvine Barclay Theatre, which took place from July 1<sup>st</sup> to September 30<sup>th</sup>, 2009. The Irvine Barclay Theatre is a performing arts center which is uniquely designed to bring international and culturally-diverse programs which range from music to dance to drama to the Orange County community. It has the capacity to hold 756 people. It is managed by an independent non-profit operating company with its own professional staff and governed by a volunteer-based board of directors.

This report includes detailed information in regards to the Barclay's history and current operations. It also includes sections on my contributions, a S.W.O.T. analysis, best practices, and recommendations I've formulated from knowledge I have acquired through the Arts Administration program and my internship as a multi-purpose assistant at the Barclay. It is important to note that throughout the time my internship and the writing of this report took place, the United States was experiencing the effects of a severe economic recession.

## INTRODUCTION

The following pages provide a comprehensive analysis of the Irvine Barclay

Theatre Operating Company, a recognized leader for presenting new programs, artists and ideas from around the world. The company brings diversity and cultural understanding to Orange County and enriches the lives of the citizens of Irvine.

Throughout the past 20 years, the company has been administrated by a small group of experienced theatre management experts. Its diverse programming includes a contemporary dance series, a World Stage Series, a signature program - the New World Flamenco Festival, and an educational outreach component— ArtsReach.

Additionally, through its unique relationship with the City of Irvine and the community at large, the Barclay has been afforded the opportunity to expand its audiences by administering the artistic programming for the recently created Great Park each summer.

This report provides a description of the Barclay's current operational status in Chapter 1 and information about the internship in Chapter 2. Chapter 3 focuses on a S.W.O.T analysis, which details current operational strength, opportunities, weaknesses, and threats and recommendations formulated from this analysis. Chapter 4 describes research conducted on best practices for the performing arts industry as a whole and recommendations on how the Barclay could specifically apply them.

Chapter 5 summarizes my contributions through the work I completed for both the outdoor dance and concert series and the milestone 20<sup>th</sup> Season at the Barclay Theater. Through a detailed examination of this company, this report will hopefully become a

resource to enable future growth of the Barclay and maybe even contribute to the development of California's arts industry as a whole.

## **CHAPTER I**

## **ORGANIZATION PROFILE**

## MISSION STATEMENT AND HISTORY

## 1) Mission Statement

The mission of Irvine Barclay Theatre (the Barclay) is "to be a leading cultural presenter featuring the work of diverse and exceptional artists and provide a state-of-the-art venue for community cultural organizations and university programs, thus broadening the scope, availability and appreciation of the performing arts in Orange County."

The mission statement is designed to be intentionally broad in order to provide the freedom to account for any growth in its operations or expansion in its programming. The theatre was initially a project developed by the City of Irvine and University of California, Irvine (UCI). Due to both groups' lack of expertise, the Irvine Barclay Theatre Operating Company, a non-profit organization located in the front entrance of UCI, was formed to run the facility. Upon examining the original contract, it is found that the City of Irvine was given permission to use the theater two-thirds of the year and UCI, the remaining one-third. Generally, UCI uses the facility for multiple activities, ranging from business conferences to the annual "White Coat Ceremony" held by the medical school. The City of Irvine has almost completely waived its use of the facility and instead allocates its usage rights in the following manner: the scheduling of the Barclay is given top priority, other organizations within the city of Irvine are given next priority, and companies outside

the city are given last. When the theatre is rented to outside companies, there are no restrictions on the event types they may hold there.

## 2) History

The Irvine Barclay Theatre opened its doors on September 30, 1990, with an Opening Gala Celebration on October 5, 1990. During this same year, the Barclay Operating Company was founded as an independent non-profit organization and was expected to maintain an innovative public-private partnership with the Theatre in the hopes of creating a unique performing arts venue. Private donors, the City of Irvine, and the University of California, Irvine each contributed funding and land to achieve a long-standing mutual goal.

The partners created Irvine Barclay Theatre to showcase top quality artists, provide a superior facility for local and regional arts groups, and enhance UCI's educational mission, particularly the programs generated by its School of the Arts. The building that contains the theater is named for Mr. Richard Barclay, an area philanthropist, who provided the largest gift for the theatre's construction. The theater's auditorium is named for Dr. George and Arlene Cheng, who also contributed large gifts to its construction.

The Barclay's 756-seat Cheng Hall is now almost constantly in use. Irvine Barclay Theatre has gained a national reputation for its intimate feel, good acoustics, and overall quality of its production facilities. When performing in southern California, it is a venue of choice for artists.

From the time of its opening up to the present day, over 3,000 performances and

events have been held in Cheng Hall, including 800 by the Barclay, 400 by UCI, and 1,800 by other presenters and producers. This has brought over 1.6 million patrons to the theater. Nearly 120,000 people attend some 215 annual events offered by the Barclay, UCI and dozens of other community presenters and producers. Internationally recognized artists and attractions such as Yo-Yo Ma, Bill Cosby, Audra McDonald, the Kirov Orchestra, the Guarneri String Quartet, Mummenschanz, Hal Holbrook, Doc Severinsen, Philip Glass, Ladysmith Black Mambazo, Cirque Éloize, Judy Collins, Ravi Shankar, Ray Davies, Mark Morris Dance Group and the National Ballet of Senegal have wowed sold-out audiences in the theater's elegant and intimate Cheng Hall.

In 2002 and 2006, Irvine Barclay Theatre was named "Outstanding Arts Organization" by *Arts Orange County*. The award recognized the Barclay's efforts in presenting diverse artists from around the world and in producing the critically acclaimed New World Flamenco Festival.

## **MAJOR PROGRAMS**

Since its opening in 1990, the Irvine Barclay Theatre has emerged as one of California's most imaginative performing arts showcases. A unique collaborative venture among the City of Irvine, the University of California, Irvine, and the private sector, the Theatre has a reputation for wide-ranging programming in the fields of contemporary dance, music, and theater arts. Shows in the season are selected based on two primary criteria: that they are artistically unique and that they fit into the

company's comparatively small budget. Current major programs are the Contemporary Dance Series, World Stages Series, *Arts*Reach educational outreach program, and a signature program: the New World Flamenco Festival. In the next five years, the Barclay hopes to further enhance programming by presenting an even higher quality of events and therefore, be able to increase its average ticket price.

Since the Barclay does not offer subscription packages, seasons are designed for audiences to create their own "packages." In other words, the Barclay encourages its patrons to buy tickets for a specific number of performances each season but patrons are allowed to select which shows they purchase and then receive a discount on all tickets purchased. The discount varies each year; for instance in the 2006-2007 Season, a 10% discount was offered for patrons who purchased tickets for four or more events. This "program versus subscription" package is both customer-oriented and easy for the Barclay staff to manage. There is usually an order form included in the annual season catalog that helps patrons decide which shows they might want to see (see Attachment N).

## 1) Contemporary Dance Series

The Contemporary Dance Series was created in 1992 and has become one of the West Coast's top dance series. In every season since its inception, four contemporary dance pieces are selected from around the world. In the 2009-2010 Season, the four selections made were Bill T. Jones's "Fondly Do We Hope...Fervently Do We Pray", a piece which combines both theater and dance to celebrate the remarkable life of Abraham Lincoln; Bruno Beltrao's Grupo de Rua from Brazil, a hip-hop-influenced

contemporary dance piece; *Bahok* performed by the Alkram Khan Dance Company and the National Ballet of China and also combines both theatre and dance; and *Joni Mitchell's "The Fiddle and the Drum"*, a contemporary fusion of art forms performed by the Alberta Ballet.

#### 2) World Stages Series

In 1995, the Barclay created the World Stages Series in conjunction with the Philharmonic Society, the goal of which was to bring various types of the finest world music to the Orange County community. In the 2009-10 20<sup>th</sup> Season, the Barclay plans to present a Korean Buddhist ritual song and dance by Young Dan Preservation Group, *Masters of Persian Music: Three Generations, A Night in Berlin with Max Raabe*, and *Craig Martin's Classic Albums Live Performs The Beatles: Abbey Road*.

## 3) New World Flamenco Festival

In response to the state of California's large Hispanic population and the growing popularity of Flamenco around the world, the Barclay launched the New World Flamenco Festival, which premiered in August 2001. Generally, at the beginning of each August, the Barclay presents a two-week long festival of artists from Spain. This year, however, due to the recession, the Barclay had to contend with a particularly tight budget and was therefore unable to present the festival.

The New World Flamenco Festival fosters a current trend that can be observed around the world. Flamenco has a point of view and style this is as artistically rich and complex as anything else in dance today. Each year the Festival commissions several different well-established "stars" of the flamenco world to create exciting new,

works to premiere at the festival. Based on an average of the previous years' ticket sales, more than 6,000 people from around the world attend the Festival each August. In addition to watching the performances, audience members can come early to enjoy Spanish cuisine at Café Flamenco, held on the plaza in front of the theater before and after every performance. In addition, an informal flamenco guitar performance is held after every performance where the audience can meet the artists they just watched perform. Different levels of flamenco-related dance workshops are offered for dance lovers before and during the festival; "warm-up" dance workshops are available for beginning students prior to the Festival's opening, while more rigorous workshops are offered during the Festival.

## 4) Arts Reach Education and Outreach Program

The *Arts*Reach education program was created in 1998. *Arts*Reach is a series of interactive activities and workshops for youth provided through collaboration between several artists each season and area K-12 schools, for the purpose of instilling an appreciation for music and the arts in younger generations. For instance, this year, the Barclay will invite the famous artist, performer, and media host Christopher O' Riley to host master classes for local children in conjunction with his performance to local audiences. Another component of *Arts*Reach is the "Adventures in Writing" program: an idea that originated from the collaboration between the Barclay and the John F. Kennedy Center for the Performing Arts in Washington D.C. The concept was inspired by the Kennedy Center's Youth Touring Department, which each year selects a piece of children's literature and reproduces it into a theatrical work which they then

tour around the country. Based upon this idea, the Barclay began holding a writing contest for local children (see Attachment O for program entry form). 12 stories are selected each year and published into a book which is then placed into the Orange County library system. Each winner also receives a certificate and the opportunity to read their stories in a reception following the close of the contest.

## STRUCTURE OF THE ORGANIZATION: BOARD, STAFF, AND VOLUNTEERS

## 1) Board Structure

When it was first founded in 1990, the Barclay had 9 board members; six were appointed by the City and three were from UCI. Because all board members were governmental appointees, they were not legally allowed to raise funds for the Theatre. After several years of negotiation between the City of Irvine and UCI, in 2000 the Board's members were increased from 9 members to 25. Today, the Barclay has more than 20 board members, including three city appointees and two university appointees.

The board is divided into several committees which are responsible for specific tasks, the largest of which is fundraising. This committee follows the "Give or Get" policy: either they must raise money through third-party funders or sponsor the Barclay themselves. The Executive Committee oversees all other operations and is responsible for ensuring the Theatre stays within its annual budget. The board essentially functions as "hands-off:" they are financially responsible for the Theatre but are not involved in its planning and programming.

The Board of Directors includes Patricia L. Murphy from RSM McGladrey, Inc., Donna Brownell, Arlene Cheng, Mark Coyle from IKON Office Solutions, Bobbie Cox from Bobbie Cox Realty, Rosemary Cumming, Tony Ellis from Citizens Business Bank, Morgan Evans from Bartel & Droste, LLP, Robert Farnsworth from Sonnet Technologies, Sam Goldstein, Kurt Hagel from Downey Savings, Skip Johnson from ROHL, LLC., DeeDee Jones, Michael A. Kerr from Bluestone Properties, Jerry Mandel, Alyce Nelson from Kaiser Permanente, Leason Pomeroy from LP3 Architecture, Ryan Rieches from RiechesBaird, Mickie L. Shapiro, Gary Singer from O'Melveny and Myers, Robert E. Tarlton from Ford Motor Company, Cheryl Trosky, and Lisa Bhathal Vogel from RAJ Manufacturing. Representatives from the City of Irvine include Sean Joyce, Mary Ann Gaido, and Rick Paikoff; representatives from UCI include Nohema Fernández and William H. Parker. Ex Officio includes Mayor Beth Krom from the City of Irvine and Chancellor Michael V. Drake, M.D. from UCI.

## 2) Staff Structure

The Barclay has 12 employees including part-time staff. Besides the board members, the organizational structure is formed by corporate, box office, and production personnel (see Attachment A for an organizational structure chart). Staff members include Douglas C. Rankin, President, Domenick Ietto, Vice President, Christopher Burrill, General Manager, Karen Drews Hanlon, Director of Communications, Gary Payne, Director of Finance, Luanne Bauer, Box Office Manager, Helena Danovich, Marketing and Press Assistant, Ginny Hayward,

Assistant to the President, Jeff Stamper, Production Manager, Ryan Main, Patron Services Manager, Brianna Sparks, Assistant Box Office Manager and Sandy Robertson, Program Coordinator.

## 3) Volunteer Corps

Volunteer ushers form the corps of the theatre's volunteers. The Barclay once regularly collaborated with a support group called Encore Circles, a company whose primary purpose was to provide groups of volunteers to non-profit organizations. Stay-at-home moms formed the bulk of those who volunteered; however, since there are fewer and fewer women who choose to not work these days, Encore Circles had trouble raising the same number of volunteers and eventually was forced to disband. Since then, the Barclay has had extreme difficulty procuring volunteers for each season, with the exception of its dozen or so volunteer ushers.

## **CHAPTER II**

## **DESCRIPTION OF INTERNSHIP**

As a multipurpose assistant, I participated in all operations of the Barclay, including artist contracting, marketing, sales, box office systems, house management and operations, financial management and reporting, and permanent and temporary staging. I was involved in two major projects throughout the summer and fall of 2009. These were as follows:

# ORANGE COUNTY GREAT PARK SUMMER DANCE AND CONCERT SERIES: FLIGHTS &

## **SOUNDS**

## 1) Program Description

As part of an ambitious, year-round program of free, public events at the Orange County Great Park, the Barclay helps plan and manage two months of Saturday night concerts and Friday night dance parties, which are held outdoors throughout the months of August and September. Last summer, over 25,000 people attended the inaugural "Night Flights" in the park and attendance figures grew even further during summer 2009. The Barclay is responsible for the selection of artists as well as arranging their contracts and meeting their staging and hospitality needs (see Attachment F for "Flights & Sounds" draft site plan and Attachment G for the 2009 program roster). They are compensated by the Orange County Great Park Corporation for this work.

## 2) My Participation

ž Assisted Program Producer and Coordinator, Sandy Robertson: contacted and met

- with artists, attended weekly meetings and assisted with show preparations (see Attachment D).
- Public relations: responsible for the online listings of all 17 performances. Posted brief information about each show on local websites such as the *LA Times*, *OC Register* and *LA Weekly*, followed up with all artists' official websites, Facebook and MySpace pages, LA online newspapers, and ensured all performance information was correct (see Attachment B & C).
- Ž Assisted with backstage preparation and merchandising booth as needed (see Attachment E).

## **IRVINE BARCLAY THEATRE 202020 SEASON**

## 1) Program Description

Luckily, I was able to begin the internship just in time for the Barclay's 20<sup>th</sup> Anniversary- aptly titled the 202020 Season. At one point during his introduction of the concept for the 2009-2010 Season to the Board of Directors, Douglas C. Rankin, the theatre's president stated:

We set out to celebrate creatively the 20<sup>th</sup> Season with something that would reflect the Barclay's individuality and our history of supporting unique and diverse programming. We also thought it especially important to be responsive to our equally diverse base of attendees and supporters during what are challenging times. We are especially grateful to our current sponsors for making it possible for us to offer these events at this special pricing.

In response to both the Barclay's 20<sup>th</sup> anniversary and the national economic climate, the theatre unveiled a special promotion: 20 different events would be featured around the \$20 ticket price (see Attachment P for the 20<sup>th</sup> Season roster).

## 2) My Participation

- Ž Assistance to the Marketing Director, Karen Drews Hanlon: season-related online research conducted as needed.
- Marketing: responsible for developing a marketing plan for the production of *The Diary of Anne Frank* (see Attachment H & I).
- Public relations: assisted in the creation of press releases and their posting on pitchengine.com (see Attachment J).
- Ž Audience development: responsible for building attendance within Chinese community; translated the 20<sup>th</sup> Season press release into Chinese and published it in local Chinese newspapers such as *International Daily News* (see Attachment K).
- ž Assisted in box office as needed.

#### **CHAPTER III**

## S.W.O.T. ANALYSIS AND RECOMMENDATIONS

The following section describes and analyzes the strengths, weaknesses, opportunities and threats of the organization primarily determined through a 90-minute interview with Douglas C. Rankin, president of the Irvine Barclay Theatre.

A S.W.O.T. analysis is a relatively easy-to-use technique for quickly gaining an understanding of an organization's strategic situation.<sup>1</sup> A S.W.O.T. analysis, referred to as a situational assessment, includes management's internal and external perceptions about the organization, as well as any factors in the external environmental that may impact the organization. Issues addressed in a S.W.O.T. Analysis are detailed as follows:

- ž Strengths: What are the organization's internal advantages? How can these be better utilized?
- Weaknesses: What are the organization's internal problems? How can these be mitigated?
- Ž Opportunities: What are any environmental conditions outside the organization it may benefit from? How can these be taken advantage of?
- Threats: What are any environmental conditions outside the organization it may suffer from? How can these be avoided?

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<sup>&</sup>lt;sup>1</sup> Steiss, Alan Walter. "Strategic Planning: SWOT Analysis, Strategies, Policies, and Implementation" *Strategic Management for Public and Nonprofit Organizations*. New York: Marcel Dekker, Inc, 2003: 73.

#### **SUMMARY OF S.W.O.T. ANALYSIS**

#### Weaknesses:

- -Insufficient staff
- -Lack of volunteer support
- -Unfeasible educational outreach

## Strengths:

- -Low turn-over/experienced staff
- -Well-maintained database with efficient data analysis reports
- -Customized "subscription" service

#### Opportunities:

- -Strong connections with the City of Irvine and University of California, Irvine
- -Strong, long-term relationships with press and media outlets
- -Partnerships with other organizations

## Threats:

- -Identity confusion
- -Competition from surrounding performing arts organization
- -Change in demographics
- -Weak economy

## **STRENGTHS**

#### 1) Low turn-over/experienced staff.

Half of the Barclay's staff is very experienced and knowledgeable about their field. Three staff members have been with the organization for almost 20 years, two for more than 10 years, and no one is what can be considered new at the Barclay. With over 35 years of experience in the management of non-profit cultural organizations, President Douglas Rankin has been with Irvine Barclay Theatre since 1986. He participated in stages of its design, funding, and construction and has been head of its operations since it opened in the fall of 1990. General Manager Christopher Burrill began working at the Barclay in 1989 and was integral to developing and designing the theater's operating systems. Vice President Domenick Ietto, head of fundraising

and development, has accrued more than 30 years of experience in this area, primarily with performing arts organizations. Director of Communications/Program Development Karen Drews Hanlon has conducted the marketing and PR for the Barclay since 1994. The part time staff structure is stable as well: for instance, Assistant to the President Ginny Hayward has been working with the Barclay on a part-time basis for almost 20 years.

## 2) Well-maintained database with efficient data analysis reports.

Each staff member fully understands the responsibilities of their job and the time frame they have in which to complete them. They have regular office meetings and perform in-depth analyses of every production and each season. The Box Office maintains a large database containing information on all audience members. Manager Lu Bauer has been using Ticketmaster software for about 10 years to track information on audience members; each season she downloads and saves reports from Ticketmaster to provide the marketing department with each event's ticket sales and attendance numbers.

Marketing Director Karen Drews Hanlon then analyzes these Box Office reports for trends in audience demographics, the degree of each performance's success, and how she can enhance the impact of marketing on future events. Ms. Drews has, for the past five years, organized each season's marketing data, promotional materials, and event details into chronological order in separate folders which she then places in filing cabinets. Through these Box Office reports and other measures, Ms. Drews has been able to accumulate an electronic mailing list of over 8,000 people and a postal

mailing list of even more.

Vice President Domenick Ietto works with the Board of Directors on corporate and community relations and designs development programs which support the Theatre's various programming and community outreach activities. He maintains all board member, donor and fundraising data, which is kept separately from the marketing and back office databases. He archives all grants and information about foundations and organizes donor data into different levels based on their previous contributions.

## 3) Customized "subscription" service

For an introduction to the type of subscription service the Barclay employs, please see Chapter 1, page 11. Because the Barclay presents many different types of artistic events in any given season including contemporary dance, music, opera, family-oriented programming, and international events, there is in turn, a large diversity in the demographics and preferences of their audiences. These preferences can be difficult to cater to using a traditional subscription service, which generally requires subscribers purchase tickets for all events in a given season. For instance, the same audience members who attend a contemporary dance performance may not necessarily want to be locked into attending a family-oriented event, as well. In response to the diversity in audience demand, the Barclay created a "do-it-yourself" system in the early 1990's to alleviate the limitations imposed by a more conventional subscription service. This D-I-Y system sells packages of events instead of entire seasons: audiences can select a certain number of events and then receive a discount

on all tickets purchased (see Attachment N for order form sample).

This system has proved very effective for the Barclay. Patrons are not forced into purchasing full subscriptions but are still able to enjoy a fairly substantial discount. Additionally, Box Office reports are much more accurate and useful than they would be for a conventional subscription service as they are able to reflect exactly what type of performance each patron is interested in. Through this system, the Barclay is able to ascertain its true target audiences as well as gauge any established or developing trends in the community's taste in arts.

#### **WEAKNESSES**

#### 1) Insufficient staff

Even though it is fairly common practice for nonprofits to downsize to a smaller staff during periods of economic instability, the number of staff members at the Barclay has always been few. Seven core staff members - a marketing director, development director, general manager, accountant, box office manager, and several assistants - take on all the responsibilities of planning and running each season's performances, special events, signature programs, educational outreach activities, and cooperative production programs. Everyone must manage a very heavy workload, especially the Marketing Director, Ms. Drews.

A recent study on nonprofit overhead cost by Ann Goggins Gregory and Don Howard from Stanford University's Graduate School of Business concluded that "nonprofits settle into a 'low pay, make do, and do without' culture...many

organizations limit their investment in staff recruiting and training...plan to cut even more overhead spending to weather the current recession." Fortunately, the Barclay is very scrupulous when it comes to hiring new personnel and would likely not allow for this "do without" culture to develop by hiring people without the necessary experience or expertise. However it is difficult to find qualified professionals without being able to offer them competitive salaries. The Barclay has recently decided to eliminate an administrative position that has remained vacant since fiscal year 2008-2009, and, in general, and has continuously suffered from a staff shortage in recent years.

#### 2) Lack of volunteer support

In the past few years, the Barclay has had almost no volunteer crew to rely on for daily and event operation management (for a further explanation of this topic, please see Chapter 1, page 16). This problem is caused partially by a development resulting from the current economy. In a recent study, the Federal Bureau of Labor Statistics has found "preliminary evidence of affluent women returning to the labor force. When conducting a survey of women with a college education who are 25 to 44 years old and living with a spouse, the proportion of those working or looking for work has increased to 78.4 percent in the first half of 2009, from 76 percent in the first half of 2007." The majority of the Barclay's volunteer pool was at one point composed of stay-at-home mothers and wives, many of whom, in today's difficult economy, have

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<sup>&</sup>lt;sup>2</sup> Gregory, Ann Goggins, and Don Howard. "The Nonprofit Starvation Cycle". Stanford Social Innovation Review Fall 2009: 49-53

<sup>&</sup>lt;sup>3</sup> Data from an article by Greenhouse, Steven. "Recessions Drives Women Back to the Work Force". *New York Times Online*. New York Times, 18 Sep. 2009. http://www.nytimes.com/2009/09/19/business/19women.html? r=2&pagewanted=1&ref=business

decided to return to work. The Barclay has therefore suffered from very little volunteer support as of late.

## 3) Unfeasible educational outreach

ArtsReach is financially, not a top priority in the Barclay's annual budget. The budget from fiscal year 2008-2009 shows that while the estimated cost of ArtsReach was projected to be \$4,000, its actual total cost turned out to only amount to \$920. Even if the Barclay had spent \$4,000 on ArtsReach, this figure is inconsequential when compared to the 2008-2009 general season budget of \$704,830. The Barclay does not make the ArtsReach program a priority for three primary reasons: 1) the cost of transportation, 2) problems with scheduling, and 3) a shortage in staff available to administer it. Neither the Barclay nor the schools it partners with have the money needed to rent a bus to commute children to and from the theater. In addition, there is usually difficulty in scheduling a time convenient for both artist and school to meet for an outreach activity. Finally, the Barclay lacks the staff necessary to run such a time-consuming program.

To avoid these conflicts, the Barclay devotes more of its time and resources to running the "Adventures in Writing" program, the details of which have been described in Chapter 1, page 13. However, as mentioned previously, the Barclay's budget was recently substantially decreased and therefore, they were unable to bring back the program this year.

## RECOMMENDATIONS BASED ON S.W.O.T. ANALYSIS

The Barclay's insufficient staff is the greatest obstacle to efficient internal operations. Under the current economic conditions, hiring new staff and consequently, increasing overhead expense, is simply not feasible. One solution to both a shortage of staff and volunteers may be for the Barclay to shift its focus to the development of its volunteer program and begin building a stronger relationship with area universities. One group the Barclay may want to consider targeting as a source of volunteers is college students in arts-related programs, reasons for which are explained below. Steps to develop this relationship and utilize this group to its fullest potential are as follows:

- Begin by conducting research on the Orange County and Long Beach communities; find university departments in these communities that may be willing to supply the Barclay with volunteers. Potential "partners" could be the MFA Theatre Management program at California State University, Long Beach and the Drama Department at the University of California, Irvine.
- In return, the Barclay staff could provide lectures and workshops for student volunteers as well as pre-performance open rehearsals that admit students for free.
- Practicum and internship positions for students could be developed which could then aid in filling gaps in the staff as well as provide valuable, hands-on experience for the students.
- ž Student volunteers might also be an asset to the development department. On this topic, the Stanford Social Innovation Review has recently concluded, "Volunteers

are effective fundraisers because their personal commitment to the organization's mission makes them convincing advocates for the cause. In addition, volunteers are likely to donate to the organization at which they serve." In addition, college-aged students generally make very active volunteers as they are typically full of passion and easy to motivate.

- Students could also motivate their friends to join them in volunteering or attending the Barclay's events, a strategy which is called "indirect solicitation by association". In line with this concept, several potential strategies to consider are to:
  - a) Request the contact information of any friends student volunteers think may be interested in Barclay performances and events and (with each person's permission) add these people to the mailing list.
  - b) Provide an introductory section before any university outreach activities are conducted to allow staff to become acquainted with the students in attendance and assess which students might be most interested in a career in theater management. After the class has concluded, staff could then schedule a time to invite them and their friends to an informal meeting to talk with Vice President, Domenick letto.
- Involve students in the *Arts*Reach program, "Adventures in Writing." TheBarclay could create an internship position specifically for qualified students to

<sup>&</sup>lt;sup>4</sup> Eisner, David, Robert T. Grimm Jr., Shannon Maynard, and Susannah Washburn. "The New Volunteer Workforce". *Stanford Social Innovation Review*. Stanford Social Innovation Review, Winter 2009. http://www.ssireview.org/articles/entry/the\_new\_volunteer\_workforce/

<sup>&</sup>lt;sup>5</sup> Rooks, Kirby. "Fundraising Ideas for Volunteers: A Nonprofit Fundraising Strategy". Suite 101.com. Suite 101, 31 March 2009.

assist the Marketing Director in administering the educational outreach programs each semester.

## **OPPORTUNITIES**

1) Strong connections with the City of Irvine and the University of California, Irvine

The Barclay would not have achieved its current success without the support from the City of Irvine and the University of California, Irvine. In the late 1980's UCI donated a 2.3-acre parcel of land and \$1.8 million in construction funding, the City of Irvine provided \$11.3 million, and a private sector fundraising campaign provided the remaining \$4.5 million needed for the construction's completion. Through this \$17.6 million public/private partnership, Irvine Barclay Theatre was able to open "on time, on budget" in the fall of 1990. Appointed representatives from the City and UCI still sit on the Barclay's board today and support the organization both financially and socially. Every year, the Barclay is given \$600,000 in general funds from the City, as well an additional \$150,000 in separate funds exclusively for the signature program, New World Flamenco Festival. UCI also provides \$300,000 annually, so that in total, the Barclay receives an average of \$1,050,000 from their public partners each year.

Social networking is a tough but necessary job for nonprofits. With the advantage of having a strong tie with local government, the Barclay receives other opportunities outside of just financial support from the City, as well. For example, the City has included the Barclay in programming events for the recently-constructed

Orange County Great Park, a park the city hopes will become known as the first great metropolitan park of the 21<sup>st</sup> century. The development, design, and advertising of the Great Park was a giant undertaking for the City of Irvine and it requested the Barclay assist them by providing the entertainment for its initial promotion. The Barclay has continued to remain an integral component of the Park's programming by producing the Great Park Summer Dance and Concert Series which they are compensated for by the Orange County Great Park Corporation.

#### 2) Strong, long-term relationships with press and media outlets

The Barclay has more than 10 years of positive relationships with major media outlets in the Orange County and Los Angeles areas, such as the Los Angeles Times, LA Weekly, The Orange County Register and KCRW Radio 89.9 FM. The Barclay also maintains strong relationships with various entertainment websites in Orange County, Los Angeles County, and the Long Beach area, including the Anaheim Visitor's Bureau, Beach California, California Travel & Tourism, Coast Magazine, Coastline Pilot, Daily Pilot, Eventful.com, Evite.com, Huntington Beach Independent, Killer Orange, LA Independent, Laguna Beach Calendar, Latino LA, Long Beach Press Telegram, OC Family, OC Metro, OC Weekly, Orange Coast Magazine, Parenting OC, Parenting LA, Zvents, Spark OC, Yelp, Zipper Arts, and others. In addition, the growing diversity in nationality in California has encouraged the Barclay to build positive relationships with local international media as well, for example with the Chinese newspaper China Daily or the Korean newspaper JoongAng Ilbo.

With its strong connections to major, local media, the Barclay can usually finagle discounts on advertising rates and generally receives more published previews, reviews and articles each season than any other performing arts organizations in the area. For its 20<sup>th</sup> Season, the Barclay was able to negotiate the low rate of \$52.65 for a 10.5 x 3" wide column in the *Los Angeles Times*, which when the recent increase in advertising rates is considered, is a fairly substantial discount.

## 3) Partnerships with other organizations

Each year, the season is designed to incorporate several shows created produced or presented in conjunction with other local nonprofits arts organizations. As a producer, the Barclay has had a long-standing relationship with National Choreographers Initiatives (NCI); the Barclay helps NCI to seek donations, handle marketing and promotions, as well as create artist contracts. As a presenter, the Barclay has as another long-time partner, the Festival Ballet Theatre, which performs *The Nutcracker* in Cheng Hall each year around Christmas. This year, the Barclay will also collaborate with the Long Beach Opera to present the Opera's production of *The Diary of Anne Frank*. Finally, the Barclay is also involved in the Philharmonic Society's Lecture Series and has maintained a strong relationship with the Philharmonic Society for many years.

These collaborations are important for the Barclay because not only can they help increase audiences for both the Barclay and its partners, they also aid in mitigating potential competition from other local arts organizations. Through these partnerships, the Barclay is also able to minimize its advertising expenses by sharing

the responsibility of marketing events with each partnering organization.

## **THREATS**

## 1) Identity confusion

Creating a strong identity for the organization has always been an important issue for the Barclay. Since the theater is located in the front entrance of the University of California, Irvine, the community often does not realize the theater is actually managed and governed by an independent nonprofit organization with its own professional staff and board of directors that are distinct from the University's. This confusion has caused problems for the Barclay and it has therefore been a difficult and slow process for the Barclay to build up the distinct brand necessary for it to flourish in a competitive environment.

## 2) Competition from surrounding performing arts organization

The Barclay is only four miles away from the Orange County Performing Arts

Center. The largest non-profit arts organization in Orange County, it, like the Barclay,
presents a wide range of national and international music, dance, and other types of
performing arts productions to Southern California audiences. When compared with
the Barclay, the Center has a longer history and stronger influence in the community.

Throughout the years, the Center has established a strong, long-standing relationship
with the community and the City. The Center has much larger facilities than the
Barclay. Within its large complex, several different theaters are contained: the
3,000-seat opera house style Segerstrom Hall, the 2,000-seat Renée and Henry

Segerstrom Concert Hall, the 500-seat, multi-functional Samueli Theater, the 250-seat Founders Hall, and a 46,000 square foot community plaza.<sup>6</sup>

In terms of online presence, the Center maintains a more user-friendly and interactive website than the Barclay's; the Center's website is not only highly accessible and easy to navigate; it is also dynamic and visually striking.

In terms of the Center's programming, six different types of performing arts programs are evenly interspersed throughout every season: international ballet and dance, national tours of Broadway shows, jazz and cabaret, classical music performed by chamber orchestras and ensembles, and family-oriented programming. The Center also offers extensive year-round educational activities for its members and audiences. It is clear the Center presents a larger, more comprehensive season than the Barclay's. However, while both organizations present a wide range of programs, the Barclay is slightly more internationally-diverse in its selections. This is evidenced by some of the productions chosen for their 20<sup>th</sup> Season which includes a performance of Buddhist ritual song and dance, Grupo de Rua, a dance company from Brazil, and Dulsori, a Korean drumming group. The Barclay also, on average, provides a more affordable ticket price for most of its shows. Luckily, both theaters are careful to construct their seasons to generally avoid overlapping schedules with one another.

#### 3) Change in demographics

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Resource from Orange County Performing Arts Center official website. http://www.ocpac.org/home/Content/ContentDisplay.aspx?NavID=41 ibid

"When minorities make up the majority of people in California, who then is a minority?" Demographers have speculated that "California will have a Hispanic majority by the year 2020, due to large-scale immigration and birth rates of Hispanic immigrants increasing at a faster rate than non-Hispanic groups."

According to the 2006 ACS Estimates, California's population, when broken down by ethnicity is: 6.8% Black, 1.2% American Indian and native Alaskan, 12.1% Asian, 0.4% native Hawaiian and Other Pacific Islander, 2.4% Multi-racial, 34.7% Hispanic or Latino, and 44.5% White, non-Hispanic. When comparing these statistics to 2000 ACS Estimates, the White and Black populations have decreased by 35.25% and 0.85% respectively, while the Asian and the Hispanic or Latino population both show a significant increase. What is more, this "majority-minority state" is still undergoing a dynamic population change each year.

These changes in demographics bring crucial challenges to the arts industry in California as they are also usually followed by changes in the community's cultural preferences. This raises the question what balance of programming to present: more traditional Western programming or increasingly-popular international programming. To resolve this question, the Barclay is trying to strike a balance by presenting both global and local artists fairly equally; however, the changing population presents constant difficulties in attempting to satisfy the community's cultural preferences and determine which art forms are the most popular. These changing demographics and

<sup>8</sup> "When Demographics Change Faster than the Terms". *Los Angeles Times Online*. Los Angeles Times, n.d. http://articles.latimes.com/2001/jan/10/news/cl-10423

ibid

<sup>&</sup>lt;sup>9</sup> Resource from *California Center for Population Research*. CCPR at UCLA. http://www.ccpr.ucla.edu/asp/description.asp

preferences may also dictate new needs in the industry's staff; as international programming becomes more popular, a better understanding of the international arts market and a proficiency in foreign languages will likely become increasingly important in the years to come.

## 4) Weak economy

"The US economy will take 'years' to get back to pre-recession levels of growth"

Paul Volcker, a former Federal Reserve chairman and adviser to President Obama, has warned. The weak economy has affected the development of almost all industries in the United States. For nonprofits especially, it has been extremely difficult to obtain the same level of support among individuals, foundations, governments and corporations as they were receiving before the recession. The Barclay Theatre is no exception.

In the past three years, the Barclay has lost money from each of its general seasons and has had to struggle to maintain a positive cash flow by dipping into its cash reserve and endowment. Major underwriting support dropped from \$301,762 in the 2007-2008 Season to \$158,450 in the 2008-2009 Season and remains less than \$200,000 for the 2009-2010 Season. This has forced the Barclay to rely on government subsidization. Marketing expenses were decreased by 14% from the previous year. And in the interest of minimizing operating expenses, all staff bonuses have been eliminated and budgetary items such as travel, business meetings,

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-recession-level-Paul-Volcker-warns.html

<sup>&</sup>lt;sup>11</sup> "US economy will take 'years' to return to pre-recession level, Paul Volcker warns". *Telegraph.co.uk*. Telegraph, 17 Sep. 2009. http://www.telegraph.co.uk/finance/financetopics/recession/6200374/US-economy-will-take-years-to-return-to-pre

professional memberships, and other staff expenses have been reduced by \$17,000.

### RECOMMENDATIONS BASED ON S.W.O.T. ANALYSIS

The Barclay has also had to institute a temporary hiring freeze.

Identity confusion is a serious threat to the Barclay. They have therefore been putting a serious effort into building up their brand within the local community. They realize that an important key to long-term success is maintaining consistency in both their image and the experience they promise patrons. It is therefore vital that the Barclay's board and staff members promote only one point of reference for the theatre: the Irvine Barclay Theatre. A number of strategies have been developed by the organization to solve the issue of identity confusion:

- ž Differentiate the Irvine Barclay Theatre in the marketplace
- ž Increase awareness of the organization
- ž Establish market growth through "thought leadership" 12
- ž Evolve their current image to a viable and defendable brand position
- ž Leverage their core attributes to build loyal partnerships

The competition from surrounding arts organizations is inevitable. One potential remedy may be to emphasize the element of "uniqueness" within the larger scope of the Barclay's identity. The Irvine Barclay Theatre is working towards becoming the dominant niche player in the Orange County community and thanks to a strong focus and smart positioning; it is quickly becoming the recognized leader for new programs,

<sup>&</sup>lt;sup>12</sup> Thought leadership is the recognition from the outside world that the company deeply understands its business, the needs of its customers, and the broader marketplace in which it operates.

artists, and ideas from around the world. When the City of Irvine's diversity is factored in with the intimacy of the size of the theater, the Barclay could easily become known as the City's center for the exploration of multicultural, audience-friendly arts products. To avoid identity overlap with the Orange County Performing Arts Center, the Barclay should continue to provide a diverse, international season by selecting original, creative, and high-quality artists and maintaining their low ticket prices. The Barclay also has the opportunity to expand their sphere of influence as they now have a large hand in the programming of performing arts events for the Great Park.

In the effort of better tracking demographic changes, the organization should improve their post-performance evaluation process. The Barclay could email letters of appreciation to their patrons for attending in conjunction with a brief survey; in return, the Barclay could provide a complimentary ticket to anyone who completes this survey. The following questions are suggested for the survey:

- a) Zip codes
- b) Ethnicity
- c) Age range
- d) Email or mailing address
- e) How they heard about the event
- f) If it was their first time attending the venue
- g) Motivation for attending
- h) Comments about performance: its content, quality, administration, or technical

aspects.

Also, ticket sale tracking and attendance reports are crucial to both demographic research and gauging the success of the show. While the Barclay is generally very good about producing and analyzing these reports, in addition, a post-performance brainstorm would also likely be useful. It is suggested that after every show, the Barclay staff meet to talk about any aspects that need addressing, including the strengths and weaknesses of the show, and then incorporate this information into future planning.

To reduce the impact of the loss of funding caused by the recession, the Barclay has been very financially careful when selecting artists for its 20<sup>th</sup> Season, with an emphasis placed on single performance events and brand marketing. All shows have been selected based on the criteria that they are both high quality and relatively inexpensive to produce or present. The Barclay has recently developed and implemented the following strategies to counter the negative influence of the current economy:

- ž 20<sup>th</sup> Season featuring 20 selected events, 95% of tickets priced at \$20
  - a) Attracts attention
  - b) Develops new audiences
  - c) Remains affordable during difficult economic times
- ž Reduce event marketing costs
  - a) Substantially reduce dependence on media advertising for specific events
  - b) Focus advertising on season and pricing

- c) Eliminate discounts through GoldStar and other vehicles
- d) Drive traffic to website
- ž Shift significant proportion of marketing online
  - a) Redesign website
  - b) Schedule release of tickets for sale on internet in advance of phone and mail options
  - c) Provide monthly email bulletins

Another effective method for survival under the current financial crisis is to set up operational crisis plans, and to line up a set of comprehensive budget strategies six months ahead of actually implementing them. The Barclay can maintain the efficacy of these plans and strategies by first, evaluating them throughout the season, and second, making adjustments and modifications where necessary.

### **CHAPTER IV**

### **BEST PRACTICES AND STRATEGIES**

The following is an analysis of the Irvine Barclay Theatre's compliance with the best practices of the nonprofit industry in California. Instead of issuing a specific guideline for California nonprofits, the California Association of Nonprofits (CAN) allows individual, regional nonprofits to keep their own organizational culture. However, it also asks them to embed responsibility for being accountable and adopt a visible and transparent culture and practice of accountability as a voluntary process. To aid in the synching of laws, regulations, and best practices in the nonprofit sector, CAN advises nonprofits to take advantage of their "integrity toolkit." This "toolkit" includes principles and strategies to employ in the governance, culture, internal controls, reporting, financial practices, audits, management, compensation, and public trust to maintain a standard of excellence in the nonprofit management within the state.

#### **FULFILL THE MISSION**

CAN Principle  $\#1^{13}$ - Charities must show that they are producing real, tangible and measurable results with which the public can identify and connect.

The Barclay has always maintained consistency between its mission and programs:

The Barclay's Mission Statement	Efforts to Fulfill the Mission
A leading cultural presenter;	In 2002 and 2006, Irvine Barclay Theatre was awarded "Outstanding Arts Organization" by

All the principles in this chapter are quoted from "Ensuring Nonprofit Integrity Initiative" on California Association of Nonprofits' official website. <a href="http://www.canonprofits.org/programs/integrity/">http://www.canonprofits.org/programs/integrity/</a>

	Arts Orange County.
Featuring the work of diverse and exceptional artists;	The Barclay brings in various types of artistic programming to the local community, including a contemporary dance series, talk shows, a music series, ballet, opera, and more. For the 20 <sup>th</sup> Season, performances like the Buddhist ritual song and dance, an Evening with David Sedaris, Masters of Persian Music, and the Korean drumming group, Dulsori, all provide evidence that original and diverse works populate the season.
Providing a state-of-the-art venue for community cultural organizations and university programs;	Every year, the University of California, Irvine uses the facility for academic purposes. Both regional and out-of-state arts organizations consistently rent the theater when there are no events being held by the Barclay.
Broadening the scope, availability and appreciation of the performing arts in Orange County.	Through providing many tickets in the \$20 price range and offering a wide range of events for all ages, the Barclay makes its productions both accessible and attractive to a large segment of the community, thereby increasing its appreciation for the performing arts.

### **INDEPENDENT BOARD MEMBERS**

CAN Principle #2- Integrity and accountability are best ensured when board members ask questions and demand meaningful answers before they act — especially when faced with confusing, complex, or eye-raising information.

The Barclay has a very "hands-off" board; they are an elected, volunteer-based committee which participates in the establishment of management policies and procedures and providing financial resources only. They also monitor the organization's daily operations, event planning, and programming. However, the Board could probably be more helpful if they possessed a better understanding of the resources necessary for the organization to run most effectively. For example,

although the organization has recently substantially decreased its budget, there is currently only one board member actively seeking funds to alleviate the impact felt by this decrease. The Board, as a whole, should be much more attentive to fundraising in both the planning and procuring stages of fundraising. In terms of the volunteer and staff shortage, the board should determine the Barclay's most pressing personnel needs and how these can best be met during periods of financial difficulty. Barclay staff could also encourage board members to be more active in the organization by meeting with board members regularly to ensure they are kept up to date on its operations and needs.

Strategies from  $CAN^{14}$ — Ask the board tough questions in meetings to make them aware of current difficulties. Encourage independence by scheduling a 15 minute executive session at the end of every board meeting during which the board can discuss issues without the executive director in the room.

### **ACCOUNTABILITY**

CAN Principle #3- Adopt an organizational culture and professional practice that makes accountability a more visible and transparent practice — not because it is required, but because it is the right thing to do.

The Barclay makes strong efforts to ensure accountability. The staff are each held accountable in their respective positions; they communicate openly and frequently with each other and report honestly to leaders and board members about programs,

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<sup>&</sup>lt;sup>14</sup> All the strategies in this chapter are cited from Ensuring Nonprofit Integrity Initiative on California Association of Nonprofits' official website. <a href="http://www.canonprofits.org/programs/integrity/">http://www.canonprofits.org/programs/integrity/</a>

operations, outcomes, etcetera. The company also maintains accountability through a healthy organizational culture as everyone feels both a fair amount of job security and a sense of responsibility for their work. President Douglas Rankin also maintains strong communication with all staff members and is therefore able to quickly resolve any conflicts that arise. However, the Barclay does suffer from one shortcoming in this department as there is not yet a system in place for actually evaluating its level of accountability. A practice such as this would help ensure that the organization maintains a level of visibility and transparency not only with its staff and board, but with the general public as well.

Strategies from CAN— Develop an accountability plan that includes specific goals and outcomes that promote accountability. Integrate the plan into the annual operational plan, incorporate it into job descriptions, and include accountability in all staff and organizational evaluations. Board and staff work together to adopt a code of ethics or operational standards including a consideration of a set of conditions for self development. Create a board/staff Accountability Committee to develop and manage a strategy for enhancing accountability practices.

### **REGULATIONS AND LAWS**

CAN Principle #4- Comply with both the letter and the spirit of laws and regulations.

With its strong connection to the City, the Barclay is constantly kept informed of changes in any laws, regulations and requirements that may affect them. Staff are

generally very diligent about staying aware of current politics, new regulations, or changes in policy within the arts industry. The Board also keeps a close eye on reports made by funders. However, there is still room for the Barclay to make improvements in ensuring its legal compliance:

Strategies from CAN- Forms such as the 990 should be made available to the public; file the 990 electronically to reduce the current level of errors to less than 1%. Nonprofits will benefit from the time and financial savings inherent in electronic filing; donors will benefit from the increased accuracy and timeliness of/access to information.

#### VISIBILITY AND TRANSPARENCY

CAN's principle #5- Increase visibility and transparency by disclosing more than is required by law.

The Barclay should provide access to information detailing its general resources to increase the public's understanding of its achievements. When considering the amount of information about itself the Barclay makes available to the public, it almost seems the Barclay is deliberately trying to conceal things. The following recommendations might help the organization increase its transparency:

Redesign the official website. The Barclay's website is somewhat outdated in its style and it can be difficult to obtain information about the Barclay (see Attachment Q for a screen shot of the home and staff web pages). Descriptions of the Barclay's history, achievements, staff, and major programs and events are not

made readily accessible on the website. Judging by its appearance, the Barclay's website has neither been well-managed nor regarded as the primary channel of information about the Theatre to the public, as it probably should be. In concordance with the recent trend in growth of online users today, the Barclay should focus on increasing the presence of their brand on the website to reduce identity confusion. It could accomplish this by both providing more information about the Barclay and providing a clearer definition of its brand.

### ž Provide an accurate annual report to the board, donors and general public.

The Barclay should begin the practice of creating an annual report to communicate to board members and donors exactly how funds are used and how this allocation assists the organization in fulfilling its larger goal of carrying out the mission. The Barclay should exercise caution when spending grants and its endowment, and clearly state its yearly expenses for the Board and donors. This will help avoid the risk of misleading stakeholders and instead helps earn their trust and future donations. In addition, the Barclay may want to consider making the annual report available online to further increase their transparency to the general public, as well.

**Treate a "whistleblower" mailbox.** CAN Principle #6- All nonprofits are harmed when another nonprofit engages in illegal or unethical behavior. The Barclay could ask the public to assist in monitoring their operations to help achieve an even further level of accountability. Suggestions and ideas from audiences and other nonprofits organizations should be highly encouraged.

### **INTERNAL CONTROLS**

CAN Principle #7- Institute internal controls to discourage self interest or fraud and encourage reporting of unethical or illegal behavior.

A large number of its staff has worked at the Barclay for many years and a clear understanding of each person's responsibilities is possessed. They are able to maintain both a steady pace in accomplishing their individual duties and a high quality of excellence in the Barclay's programming. So while there are rarely any issues of unethical or illegal behavior, to continue to avoid oversights in internal control in the future, the following strategies may be employed:

Strategies from CAN- Develop and distribute a whistle-blower policy to all staff, board, volunteers, and clients. Encourage everyone to communicate any concerns about behavior and practices within the organization by investigating these concerns and reporting on what has been discovered.

Note: CAN's seven principals have been reproduced and reorganized in conjunction with a description of the current organizational structure of the Barclay for the purpose of analyzing how this research applies to the organization.

### **CHAPTER V**

### MY TIME AT THE BARCLAY

#### **GAINS**

During my time at the Barclay, I came to realize that my previous experiences in the field were more theoretical than practical. I repeatedly found myself asking the same question while in school: "how far am I from the actual reality of the job?" My experiences at the Barclay felt vaguely familiar but simultaneously retained a distance from the methods and practices I learned in the Arts Administration program. About 40% of my time at the Barclay was spent reading and analyzing the documents and materials they used to guide operations. These included plans for the season's programming and marketing, strategic plans, budget assumptions, artist contracts, and a variety of online reviews and press releases. Another 20% of my time was spent attending staff meetings and observing staff perform daily duties. I was therefore able to observe the manner in which staff communicated with one another, negotiated with clients, and took steps to minimize the impact of budget cutbacks. I would summarize the knowledge I gained through my observations in the following ways:

- In terms of marketing management, one of the most important goals for an organization should be to build and expand the company brand worldwide.
  Identity confusion can be the biggest obstacle for the continued development of an organization.
- Ž Creating and advertising a unique concept for the season, as a whole, can attract larger audiences. In advertising, audiences are easier to reach through the use of

pictures versus words.

- A marketing plan is worthless if it is not actually implemented. In reality, however, marketing plans are dictated by their budgets. Throughout the process of marketing, changes in the market should be monitored and strategies adjusted to reflect these changes constantly. Efforts should remain closely-tied to the community they are attempting to reach. Often, the more simple the method (such as electronic and direct mailings), the more effective and cost-efficient the result.
- Arts administrators should spend a substantial portion of their time building social networks. The more people you know, the more opportunities open up for you and your organization.
- Ž Developing and carrying out strong fundraising strategies is essential to the health of a nonprofit organization.
- ž It is important to reposition the organization annually since its external environment can change drastically from year to year.
- Communication and relationship-building are two of the most important elements of a well-run organization. Management should focus on clear, consistent communication with its employees and employees should, in turn, try to maintain positive relationships with their colleagues. Maintaining strong relationships with both public and private partners can secure important opportunities and build larger social networks for the organization.

### **CONTRIBUTIONS**

My contributions to the organization have come in the form of the completion of many, small tasks. For instance, when I was working on the Orange County Great Park Summer Dance and Concert Series, the most useful work I accomplished was creating an online listing for it (see Attachment B for online listing sample and Attachment C for "Flights & Sounds" events information form). I contacted 30 local websites and posted information about 17 events on their calendars. It was time consuming work. First, research needed to be conducted as each website had different instructions for posting ads and I had to learn the policies for each of them. Also, the use of technology can often be a difficult and trying experience. After numerous attempts, I eventually was able to post all of the ads online. Although it was an important and necessary task, nobody really wanted to take it on since it can be difficult to expend so much time and energy on such a monotonous task.

The biggest task I completed was for the 20<sup>th</sup> Season and involved reaching out to the local minority populations, including the area's Chinese and Jewish communities. In the hopes of attracting new audiences from amongst the state's growing diversity in population, the Barclay has become increasingly focused on the presentation of international shows each season. In attempt to reach the area's Chinese population, I drafted a press release in Chinese for the 20<sup>th</sup> Season as a counterpart to the English version. I also conducted online research to generate a list of local Chinese newspapers, television, and radio stations, and then contacted each to collect information on their advertising policies and press contacts. I then updated this information on the Barclay's media contact database. As a result of my efforts, the

20<sup>th</sup> Season Chinese press release was published in two Chinese newspapers for free: the *International Daily News* and the *World Journal*. In addition, information about the general season was broadcast on the LA television channel 18.8 every Friday evening throughout the months of September and October at no cost to the Barclay.

In terms of my efforts to reach the Jewish community, I spent a good deal of time writing a marketing plan for the show *The Diary of Anne Frank*. I conducted preliminary research for the plan by compiling a list of the major Jewish neighborhoods in Orange County, Long Beach and a portion of Los Angeles County (see Attachment I for the contact list). I then studied the Barclay's marketing and operation budget from the previous season, familiarized myself with the life and story of Anne Frank, and interviewed Marketing Director Karen Drews Hanlon to gain a better understanding of the common strategies the Marketing Department uses. I was therefore able to generate a complete plan and budget (\$4,284.78) for marketing the show.

While I do not feel I have accomplished anything too major for the organization, I do feel I did my best when completing the tasks assigned to me and that I was able to take away important experiences simply being involved in the daily operations of the Barclay. I am thankful for my time at the Barclay as it afforded me with both the opportunity to learn how a nonprofit operates during times of financial difficulty as well as continue to form my future professional goals in the field of arts administration.

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"Ensuring Nonprofit Integrity Initiative". *California Association of Nonprofits*. CAN, n.d. Web. 10 Oct. 2009.

http://www.canonprofits.org/programs/integrity/

While the following websites have not been expressly cited in this report, they were an important resource for building my understanding of the management of non-profit organizations so I quote them here as recommended online resources for my colleagues.

### The Foundation Center - http://foundationcenter.org/

The Foundation Center is a national nonprofit service organization recognized as the nation's leading authority on providing multiple services especially for grantmakers and grantseekers. It is also a resource center for nonprofit administrators to gain knowledge about current market trends, global issues and the nonprofit sector in general. Financial reports, strategic plans, research results and fundraising resources are included in its database.

#### Free Management Library (SM) - http://managementhelp.org/

The Free Management Library, developed by Authenticity Consulting, LLC, provides information on every aspect of nonprofit and for-profit management. There are approximately 650 topics in their library; including how to start, develop, operate, evaluate, and resolve problems in nonprofit and for-profit organizations. Users can quickly obtain valuable tips and references by looking at the subtopics, brief information, and additional links they provide under each main topic.

#### **ACKNOWLEDGEMENTS**

I would like to take this opportunity to extend my appreciation for all the people who have helped me, not only in completing this report, but throughout my time pursuing a Master's degree in Arts Administration at the University of New Orleans.

First and foremost, my deepest gratitude goes to my graduate advisor Harmon Greenblatt, my supervisor Jean Cranmer, and my beloved friends Megan Workman, Rachel Puckett, and Song Lian, who have been by my side since the beginning of the program. Without their constant assistance and encouragement, I could not have overcome the many obstacles I faced being a student in a country I had never visited before and completed my academic goal both competently and relatively quickly.

Also, I would like to offer my heartfelt gratitude to Dr. Kevin Graves, who first guided me through the process of writing a professional research paper in English during an independent study on the global arts industry I completed with him in the summer of 2008. In addition, I felt very fortunate a year later when Dr. Graves again accepted my request to become my major professor for this report and thus, work closely with me on its creation. I am very grateful for the constructive comments and consistent guidance he has offered me throughout the process.

I am also very grateful to all the professors and instructors in the Arts Administration Program at UNO, specifically my Arts Law instructor, William Abbott, and Marketing the Arts instructor, Richard Read. I also hold the highest respect for my Development and Fundraising instructor, Marcia Lobman, who passed away on October 4, 2009 for whom I am still grieving the loss of her. She was my first

professor after arriving in the United Sates and she will always hold a special place in my heart.

Additionally, I would like to express my appreciation for the Barclay staff and my friend Wenzheng Chen. I want to thank President Douglas Rankin for originally offering me the opportunity to work with the Barclay and Sandy Robertson for initially orienting me to my responsibilities upon assuming the position. Also, a thank you to both Mr. Rankin and Marketing Director, Karen Drews Hanlon, for providing me with as much information as they could on the Barclay's operations in order for me to gain a better understanding of them and make this report as detailed as possible. Ms. Drews was even kind enough to bring me her own arts management report from 1992 to use as a reference while I created this one. Also, another huge thank you goes to my friend, Wenzheng Chen, who was the first person to proofread my report despite the fact that he was very busy with his own work.

Last but not least, my sincere thanks would go to my family for their love and faith in me throughout the years. I feel very grateful for my wonderful family, friends, and teachers and will carry what they have taught me throughout the rest of my life.

#### **VITA**

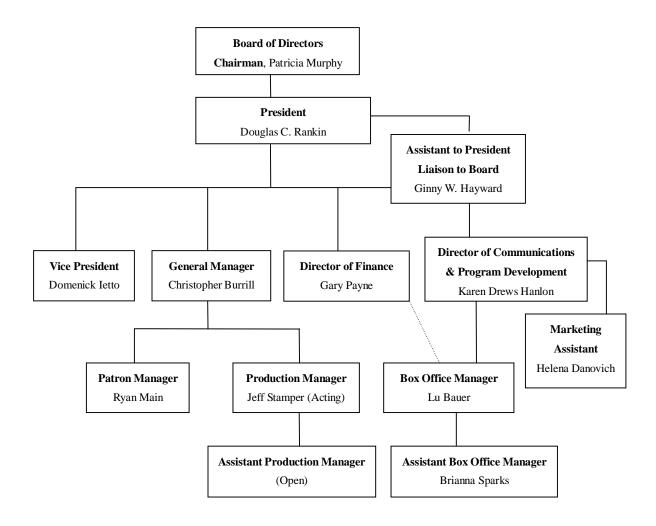
Lu Chen, originally born in Mainland China, earned her Bachelor's degree in Arts Management from Beijing Dance Academy in 2007, and is currently completing her Master's degree in Arts Administration at the University of New Orleans. During her internship at the Irvine Barclay Theatre, California, she served as a multipurpose assistant under the management of many experienced professionals in the field. She also worked as an associate for the Marketing Director of the New Orleans Opera for the 2008-2009 Season, a coordinator for the Beijing International Ballet Invitation in 2007, a journalist for Wenhua Art Academy for the Eighth Peach & Plum Cup Dance Competition in 2006, and a backstage manager for the dance drama, *Dreaming Red Mansions*, in 2005.

Throughout her six years of arts management education, she has been fortunate to gain a wide variety of work experience in school as well as outside of it. She was a teaching assistant at Beijing Dance Academy for four years, a music teacher at the Academy of Chinese Studies in New Orleans in the fall of 2008, and a graduate assistant with Student Persistence and Recovery Initiatives at the University of New Orleans from January 2008 to May 2009, where she had the opportunity to work with many department directors towards increasing the retention rate within the University. She has been characterized by her former supervisor, Dr. Jean Cranmer, as being a "trustworthy, highly-dedicated young lady of character and distinction."

### **ATTACHMENTS**

### **ATTACHMENT A**

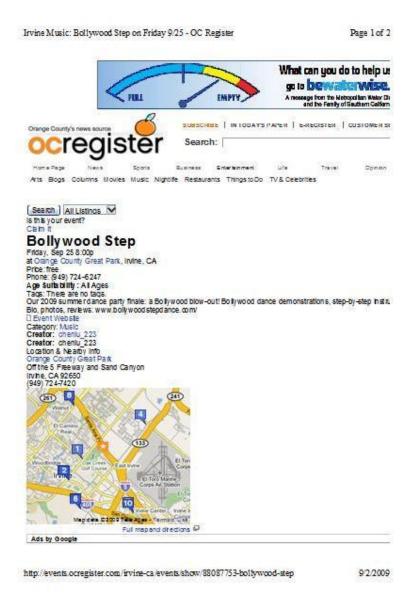
### Irvine Barclay Theatre Operating Company Organizational Structure Chart



### **ATTACHMENT B**

### Orange County Great Park "Flights & Sounds" Online Listing Sample

2009 Dance Party Finale: a Bollywood Blow-out! Event Information on OC Register



# **ATTACHMENT C**

"Flights & Sounds" All Events Information Form for Online Listing

Event	Date	Time	Venue	City/State	Event Type	Contact
EILEEN IVERS and IMMIGRANT SOUL (New York) America's favorite Irish fiddler fronts a supremely skilled rock/pop/soul band Bio, photos, reviews: http://www.eileenivers.com/	August 1, 2009	8:00P	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	Irvine, CA	Music	Orange County Great Park 949.724.6247 http://www.ocgp.org
NACHITO HERRERA (Latin) Veteran of Cubanismo and Afro-Cuban All-Stars, now bandleader of his own talented ensemble Bio, photos, reviews:	August 7, 2009	8:00P (Free dance instruction at 7:30pm)	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	and Irvine, CA (Vay, 518)	Dance Party	Orange County Great Park 949.724.6247 http://www.ocgp.org
DON VAPPIE and the CREOLE JAZZ SERENADERS (New Orleans) Classic jazz with virtuosic banjo, a bold horn section, piano, bass and drums Bio, photos, reviews:	August 8, 2009	8:00P	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	unty iand Irvine, CA Nay,	Music	Orange County Great Park 949.724.6247 http://www.ocgp.org
DEREK BORDEAUX GROUP (Rhythm & Blues) Derek's sultry, honey-sweet Motown voice is the heart of this tight-as-a-drum sextet Bio, photos, reviews: www.derekbordeaux.com/	August 14, 2009	8:00P (Free dance instruction at 7:30pm)	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	Irvine, CA	Dance Party	Orange County Great Park 949.724.6247 http://www.ocgp.og
TOTO LA MOMPOSINA (Colombia)  Afro-Latin rhythms and romantic melodies — a rare appearance by the Caribbean diva  Bio, photos, reviews:	August 15, 2009	8:00P	Orange County Great Park (Sand Canyon and Marine Way,	Irvine, CA	Music	Orange County Great Park 949.724.6247 http://www.ocgp.org

http://www.totolamomposina.com/indexeng.html	80	(8-1)	Irvine, CA 92618)		20	
PETE JACOBS and his WARTIME RADIO REVUE (Swing) Classic American swing, with Benny Goodman-style solos, Andrews Sisters-style harmonies Bio, photos, reviews:	8: August 21, (F 2009 in	8:00P (Free dance instruction at 7:30pm)	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	Sand Irvine, CA and Irvine, CA Way,	Dance Party	Orange County Great Park 949.724.6247 http://www.ocgp.org
FRANCESCA GAGNON "The Voice of Alegria" with INTI-ILLIMANI (Canada/Chile) A special event created just for the Great Park: Francesca Gagnon, the voice of Cirque du Soleil's longtime hit "Alegria" sings the music of Cirque with Chilean folk icons Inti-Illimani Bio, photos, reviews: http://www.gamisim.com/	August 22, 8:	8:00P	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	Irvine, CA	Music	Orange County Great Park 949.724.6247 http://www.ocgp.org
CEDRIC WATSON (2)/deco) Accordion master and Grammy nominee goes on tour with his south Louisiana swamp-mates Bio, photos, reviews:	8: August 28, (F 2009 in 7:	8:00P (Free dance instruction at 7:30pm)	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	Irvine, CA	Dance Party	Orange County Great Park 949.724.6247 http://www.ocgp.org
BIG BAD VOODOO DADDY (Southern California)  True heroes of the swing revival, Big Bad Voodoo Daddy celebrates 100 years of Cab Calloway, the legendary fireball whose feel-good energy energized a country slogging through tough times  Bio, photos, reviews:	August 29, 8:	8:00P	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	Irvine, CA	Music	Orange County Great Park 949.724.6247 http://www.ocgp.org

STEVE LUCKY and the RHUMBA BUMS (Swing) Along with the lovely Miss Carmen Getit, the Burns play swing, jump blues and hot jazz Bio, photos, reviews:	8:00p September (Free 4, 2009 instru 7:30pr	8:00P (Free dance instruction at 7:30pm)	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	unty Sand Irvine, CA Way, 518)	Dance Party	Orange County Great Park 949.724.6247 http://www.ocgp.org
17 HIPPIES (Berlin) French songs, English ballads, international rhythms: September a captivating cocktail of sound Bio, photos, reviews: http://17hippies.de/	September 5, 2009	8:00P	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	Irvine, CA	Music	Orange County Great Park 949.724.6247 http://www.ocgp.org
JOHNNY POLANCO y su CONJUNTO AMISTAD ( <i>Salsa</i> )  Our favorite <i>salsero</i> , Johnny Polanco is a true legend among LA bandleaders  Bio, photos, reviews: johnnypolanco.dimelorecords.com/	September 11, 2009	8:00P (Free dance instruction at 7:30pm)	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	unty Sand and Irvine, CA Way, 618)	Dance Party	Orange County Great Park 949.724.6247 http://www.ocgp.org
NIYAZ (Iran/Los Angeles)  "Call it Sufi music or World Fusion, but one thing is for sure, the band Niyaz is an Iranian musical trio whose debut album ranked #1 on world music charts on iTunes"  Bio, photos, reviews: http://niyazmusic.com/	September 12, 2009	8:00P	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	unty sand livine, CA Nay,	Music	Orange County Great Park 949.724.6247 http://www.ocgp.org
MERCHANTS OF MOONSHINE (Country)  Hurray for the two-steppers, the line-dancers, and the citified folk in their shiny new boots!  Bio, photos, reviews: merchants of moonshine.com	September 18, 2009	8:00P (Free dance instruction at 7:30pm)	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	and Irvine, CA  Nay,	Dance Party	Orange County Great Park 949.724.6247 http://www.ocgp.org

HAPA ( <i>Maui</i> ) An evening of Hawaiian bliss: HAPA is the sound of September Maui Bio, photos, reviews: http://www.hapa.com/	September 19, 2009	8:00P	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	and Irvine, CA Vay,	Music	Orange County Great Park 949.724.6247 http://www.ocgp.org
BOLLYWOOD STEP (Boilywood disco party!)  Our 2009 summer dance party finale: a Bollywood blow-out! Bollywood dance demonstrations, September (Free step-by-step instructions, a party atmosphere and fun 25, 2009 instrufor all 7:30p	September 25, 2009	8:00P (Free dance instruction at 7:30pm)	Orange County Great Park (Sand Canyon and Marine Way, Irvine, CA 92618)	unty sand and Irvine, CA Nay, 518)	Dance Party	Orange County Great Park 949.724.6247 http://www.ocgp.org

### **ATTACHMENT D**

### A Map for "Flight & Sounds" Artists



Directions from the John Wayne Orange County Airport (SNA) to Doubletree Hotel Irvine Spectrum:

- I, Follow the signs to the Aiport Exit.
- 2, Turn left onto MacArthur Blvd.
- 3, Turn onto the 1-405 South toward San Diego.
- 4, After just over 4 miles, exit at Sand Canyon Avenue.
- S, Turn left onto Sand Canyon Avenue.

- 6, After half a mile, turn right onto Barranca Parkway.
- 7, In one mile, turn left on Pacifica.

Doubletree Hotel Irvine Spectrum Contact Information:

Address: 90 Pacifica Avenue, Irvine, CA 92618

Telephone: 1-949-471-8888

Website: http://www.doubletreeirvinespectrum.com/

## **ATTACHMENT E**

"Flights & Sounds" Stage & Backstage set up at the Great Park's Preview Park



The orange balloon is the sign of the Park; the stage is settled right next to it.



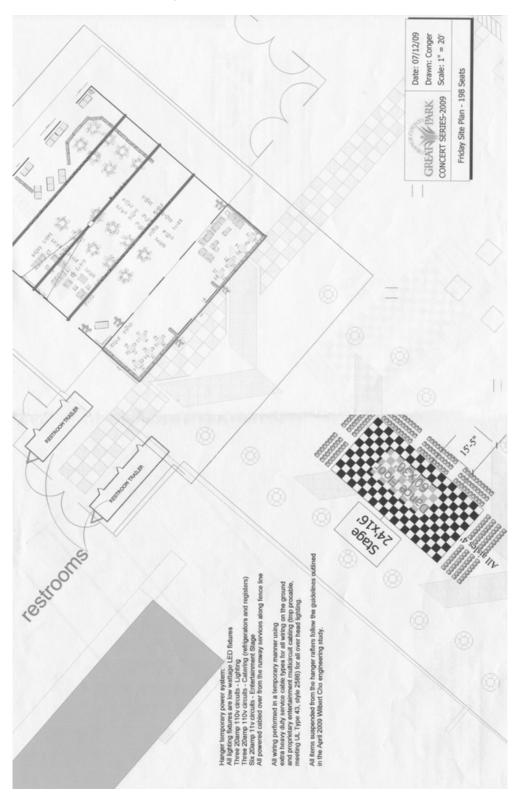
Backstage artists and staff dining tent, dressing room & motor home location

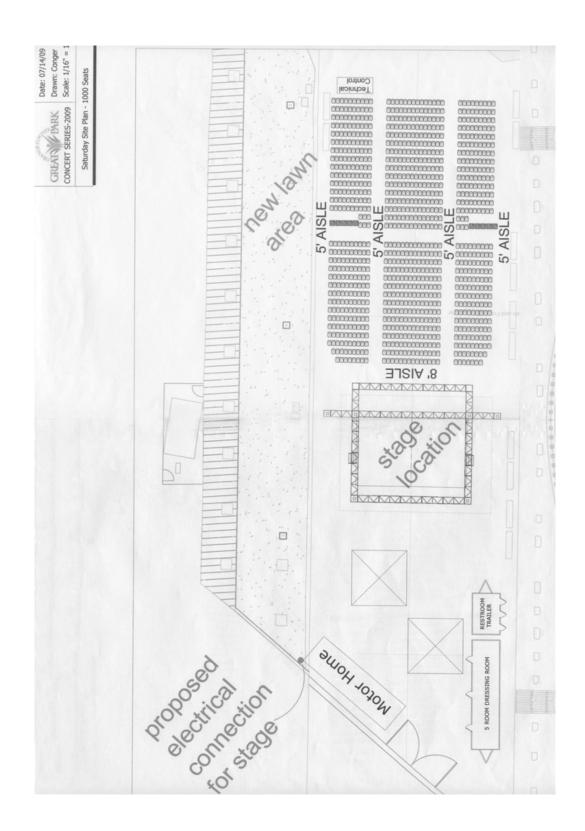


Front view of stage

# **ATTACHMENT F**

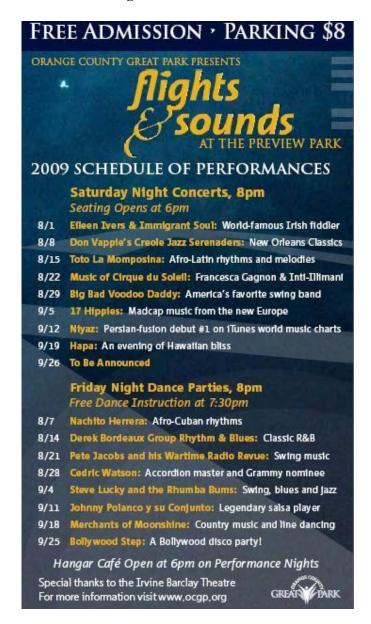
"Flights & Sounds" Draft Site Plan





### **ATTACHMENT G**

"Flights & Sounds" Roster



#### ATTACHMENT H

### Marketing Plan for "The Diary of Anne Frank"

### 1. Project description

In 85 minutes, through 21 scenes, we will hear Anne Frank's intimate description of the two years she spent in an Amsterdam attic hiding from the Nazis. The young teenager describes her hopes, fears and dreams for the future. A nine piece chamber orchestra will accompany the soprano to sing for Anne Frank. Interwoven into the opera will be another experience: Laura Hillman was 16 in 1942 when she and her family were sent to a deportation camp. She will tell of finding love during the Holocaust and her survival as one of the 1,100 Jews on Schindler's List. This will be an evening where two relevant voices – one from the past and one from the present – combine to tell powerful stories that should never be forgotten. (Pre-opera talks start one hour before the show.)

### ž Strengths:

- Well-known historical and powerful story.
- The Barclay has 20 years of industry experience.
- It's an opera but suitable for all ages. Reason: The Long Beach Opera creates unique version of existing works, presents *The Diary of Anne Frank* in daring productions.

#### ž Weaknesses:

- Venue changed, from parking garage back onto stage, which falls off the uniqueness of the show.
- Barclay barely presents opera show before, which needs to reach out to new audiences opera lovers.
- Economic downturn. Operating with a smaller budget for project than usual.

#### 2. Audiences

- ž Community: the community of Long Beach and Orange County
- ž Existing Target Audience:
  - Long Beach Opera mailing list: audiences from last 2007 Long Beach Opera Anne Frank show
  - The Barclay mailing list: classical music lovers
- ž Potential Target Audience:
  - Local Jewish community (Attachment I)
  - Local college music, history and literature departments
  - Young professionals within the Long Beach and Orange County arts community
  - Senior citizens within the Long Beach and Orange County community
- ž Primary Target Audience:
  - Local Jewish community (see map below for locations of Jewish community in Long Beach, Orange County and partial Los Angeles County area)



### 3. Competitors

#### ž Opportunities

- Existing partnerships with Local Newspapers, such as *LA Times* and *OC Register*
- Collaborations with Long Beach Opera

### Suggestions for Anne Frank:

- Advertising in Local Newspapers.
- Sending out E-newsletters to both Long Beach Opera and the Barclay email lists.

#### ž Threats

- Hunting Beach Playhouse presented *The Diary of Anne Frank* shows on July 2009

#### Suggestions for Anne Frank:

- Sharing the mailing lists with the Hunting Beach Playhouse to get Anne Frank lovers from them.

### 4. Publicity:

- Ž Media alert and press releases: Available on pitchengine.com, the Barclay and Long Beach Opera official website, Jewishlongbeach on twitter and *Orange County Jewish Life Magazine* on facebook. *Suggestions: For Anne Frank and also the 20<sup>th</sup> Season, the Barclay could hold a preview party one night and invite only members of the press to increase media interest and the chances of securing an editorial or review.*
- ž Email lists: Utilize the "Big List" to send out E-newsletters, updating information and show reminders, includes the Long Beach Opera, the Barclay and the Huntington Beach Playhouse Anne Frank show email lists.
- ž Media sponsorship: The feasibility of in-kind marketing with local media.

### 5. Advertising:

- ž Direct Mail: The Barclay sends out the 20<sup>th</sup> Season brochure/roster to the mailing lists. (*Target existing audiences*)
- **ž** Newspaper/Magazine: The 20<sup>th</sup> Season roster on *LA Times* and the Anne Frank show announcement on *Orange County Jewish Life Magazine (Target local Jewish audiences)*.
- ž Radio shows: Conduct a radio interview with Artistic Director Andreas Mitisek on KUSC-FM 91.5 L.A. Classical Music outlet. (*Target local senior citizens*)
- Web/online resource: Campaign on Facebook Build an Anne Frank show page
  on the Barclay and Long Beach Opera facebook, develop a quiz about "what's
  your character in *The Diary of Anne Frank?*" "Do anyone know your diary
  secrets?", and motivate all fans to become an Anne Frank lover. (*Target young audiences/professionals*)
- ž Posters/Rosters: the Barclay sends out the Anne Frank show posters and the 20<sup>th</sup> Season rosters to local Jewish communities. (*Reach out to local Jewish communities*)
- Ž Other: Advertising through *Arts*Reach Education and Outreach program.

### 6. Budget

		e Barclay Theatre ''20/20/20'' ne Frank'' Marke	ting Budget			
Category	Payee	Amount	Memo			
	LA Times	\$552.80	The 20 <sup>th</sup> Season roster 10.5 x \$52.65			
Advertising	Jewish Life Magazine	\$399.00	Width: 3 3/5", Height 2 1/2", 1x Rate, 5% off for non-profit			
	KUSC-FM 91.5	In kind	The morning show			
Design Production	Hayden Design	\$126.79 (EST.)	Poster design			
Postage	U.S. Postmaster	\$1,232.50	11600 mailers (8000 Barclay; 3600 Long Beach Opera)			
Printing	Color Digit	\$1,973.69 (EST.)	11600 mailers (8000 Barclay; 3600 Long Beach Opera); 2500 rosters and 25 posters to local Jewish communities			
Total		\$4,284.78				

### 7. Evaluation

ž Surveys: The Barclay could send out a letter of thanks includes a short survey to

patrons through email shortly after the performance *The Diary of Anne Frank*. The Barclay could offer a complimentary ticket to anyone who completes this survey.

The Barclay should include the following key information in their survey to best gauge whether they were successful in reaching their target audience for the performance *The Diary of Anne Frank*.

- Zip codes
- Age ranges
- Email or mailing address
- How they heard about the event
- If it was their first time attending the venue
- Motivation for attending
- Comments/criticism of performance or administration/technical aspects of performance.
- ž After show ticket sale report analysis.
- ž Post-performance Brainstorm: The Barclay staff could talk about the strengths and weaknesses of the show and then incorporate this information into future planning.

# ATTACHMENT I

# **Local Jewish Community Contact List**

Organization Name	Website	Address
JFCS-Jewish Family & Childern's Services of Greater Long Beach/West Orange Count http://www.jfcslongbeach.org/	unt http://www.jfcslongbeach.org/	3801 East Willow Street, Long Beach, CA 90815
Jewish Federation Greater Long Beach & West Orange County	http://www.jewishlongbeach.org/index.aspx?page=1 3801 E Willow St, Long Beach, CA 90815	1 3801 E Willow St, Long Beach, CA 90815
The Barbara & Ray Alpert Jewish Community Center	http://www.alpertjcc.org/	3801 E Willow St, Long Beach, CA 90815
Temple Israel Long Beach	http://www.tilb.org/	269 Loma Ave, Long Beach, CA 90803
Jewish Federation Orange County (Orange County Jewish Historical Society)	http://www.jewishorangecounty.org/index.aspx?pag	http://www.jewishorangecounty.org/index.aspx?pag/1 Federation Way, Suite 210, Samueli Jewish Campus, Irvine, CA 92603-0174
Merage Jewish Community Center of Orange County	http://www.jccoc.org/	1 Federation Way, Suite 200, Irvine, CA 92603-0174
Jewish Family Service of Orange County	http://www.jfsoc.org/	1 Federation Way, Suite 220, Irvine, CA 92603-0174
The Bureau of Jewish Education	http://www.bjeoc.org/index.html	1 Federation Way, Suite 205, Irvine, CA 92603-0174
Hillel Foundation of Orange County	http://www.ochillel.org/	1 Federation Way, Suite 100, Irvine, CA 92603-0174
Irvine Jewish Community Cong		30 Hughes # 200, Irvine, CA 92618-1916
Chabad Jewish Center of Laguna Beach	http://www.chabadoflaguna.com/	30804 Coast Hwy, Laguna Beach, CA 92651
Chabad Jewish Center of Newport Beach	http://www.jewishnewport.com/	3412 Via Oporto # 201, Newport Beach, CA 92663-3933
Chabad Jewish Center of Tustin (serving Tustin and Santa Ana)	http://www.chabadtustin.com/	2351 Sunningdale Drive, Tustin, CA 92782-1088
Chabad Jewish Center & Hebrew	http://www.chabad.org/	24041 Marguerite Pkvvy, Mission Viejo, CA 92692-1901
Jewish Community Center		250 Baker St E, Costa Mesa, CA 92626
The Jewish Community Center	1000	2018 Vail Ave, Redondo Beach, CA 90278
Morasha Jewish Day School	http://www.morasha.org/about/contact_map.html	30482 Avenida de las Banderas, Rancho Santa Margarita, CA 92688
Zimmer Children's Museum of Jewish Community Centers of Greater	http://www.zimmermuseum.org/	6505 Wilshire Boulevard, Suite 100, Los Angeles, CA 90048
Westside Jewish Community CenterWestside Jewish Community Center	http://www.westsidejcc.org/	5870 W Olympic Blvd, Los Angeles, CA 90036-4657
Jewish Community Library of Los Angeles	http://www.jclla.org/	6505 Wilshire Blvd # 300, Los Angeles, CA 90028-4926
Orange County Jewish Life Magazine	http://www.ocjewishlife.com/	

### **ATTACHMENT J**

### The Hobbit Full Press Release on pitchengine.com

A Journey through Middle Earth for the Whole Family - Irvine Barclay Theatre - pitcheng Page 1 of 4



Irvine Barclay Theatre

# A Journey through Middle Earth for the Whole Family

#### Theatre Sans Fil brings the Hobbit to the Barclay's 20th season

08.18.2009 – Who hasn't heard of Tolklen's superb trilogy of "The Lord of the Rings?" Montréal's Théâtre Sans Fill brings to life the story where it all began — "The Hobbit" with the wonderful journey of Bilbo Baggins on his way to a new level of wisdom.

Théâtre Sans Fil's highly successful glant puppet adaptation of this award-winning Tolkien fantasy has received standing ovations throughout the world. This newly revived production has been completely redesigned with a new, larger-than-life bok. It's a perfect gift for both adults and kids.

Saturday, October 24, 2009 at 2 & 7 pm

Invine Barciay Theatre - 4242 Campus Drive Tickets: \$20 | recommend ages 6+ 949.854.4646 | www.thebarciay.org | www.ticketmaster.com

Theatre Sans Fil is a Montreal-based puppet theater company, that has gamered international a colaim for over 35 years for its elaborate shows which use glant puppets. It is famous for presenting pure fantasy on the dramatic stage acted by Itle-size puppets in exaggerated manifestations. The name Theatre Sans Fil, which translates as "the ater without strings", was initially inspired by the classical fechnique of Japanese Bunraku theatre in which large puppets are directly manipulated by camouffaged performers, rather than by the pulling of markonette strings. Theatre Sans Fill has updated the subtly expressive artisty of Bunraku with the wizardry of contemporary technical theater, including black lights, lasers and Dolby-Stereo quadraphony.

The company was founded in Quebec in 1971 by Andre Viens, Atlatic and General Director. Since its beginning, TSF has visited the four comers of the world, its creations reaching over 3 million spectators in more than 25 countries and 4 continents. Year after year, The attre Sans Fils con quers new public arenas and confirms its role as cultural ambassador.

http://www.pitchengine.com/free-release.php?id=21617

A Journey through Middle Earth for the Whole Family - Irvine Barclay Theatre - pitcheng Page 2 of 4

Fantasy, poetry, make-believe and magic have always figured strongly in TSF's texts, along with unusual and hero to characters. J.R.R. Tolkien's The Hobbit and The Lord of the Rings, Ravel's Bole to and The Child and the Enchantments, Hennette Majors The Crown of Destiny and The Dream Catchers as well as the classic Hansel and Gretel tale are some of the spectacular shows that have been created over the years that cater to audiences of all ages.

The company's production of "The Hobbit" was created in 1979. It toured Canada, the U.S., Mexico, Vietnam, Talwan, Hong Kong and Singapore in the 80's and 90's. In 1984, Performances of "The Hobbit" were sold-out at the Olympic Arts Festival at the Los Angeles Olympic Games. After being out of the repertoire for over ten years, "The Hobbit" agains starts its journey beginning with the invihe Barciay Theatre's 20/20/20 season, bringing a new technical and a flistic complex, larger-than-life look and highly successful adaptation - the wonderful journey of Bilbo Baggins - with a new level of wisdom to our loval audiences.

The Washington Post review stated, "Theatre San Filfs production is a bold and rive ting the atribal experience for any age. Several qualities set Theatre Sans Fil apart, including their brilliant use of stereophonib sound ... the set design and lighting are simple enough to hispitie imagination and flexible enough to defyit."

J. R. R. Tolkien, a philologist born in South Africa and raised in England, was a professor at Oxford University until his retirement in 1959. His books, including "The Hobbit," "The Lord of the Rings" trilogy and "The Silmarillion," can now be read in virtually every language and have become world-wide favorites. His first book, written in 1936 as a gift to his two sons, "The Hobbit" follows the quest of home-loving Bilbo Baggins to win a share of the treasure guarded by the dragon, Smaug. It was influenced by Tolkien's reading of English, German and Scandinavian folkiore, resulting in a world where the creatures of several cultures and fantasies reside together, a bing with many invented by Tolkien.

As part of the Barolay's 20/20/20 season, tlokets for the Theatre Sans Fil production of "The Hobbit" are \$20. To buy tickets contact the Barolay box office (949) 854-4646 or go on line at www.theBarolay.org.or.www.tloketmaster.com. MasterCard, Visa, American Express and Discoverare accepted.

The Theatre is located at 4242 Campus Drive at Bridge and West Peltason Roads in Invine.

For a complete list of events in the Barchy's 20/20/20 season go to: http://pitch.pe/18237

#### Twitter Pitch

Hobbits, elves and a world of fantasy. Get your family and enjoy the adventure on Oct 24, 2009 @ the Barolay!

#### News Facts

http://www.pitchengine.com/free-release.php?id=21617

Theatre Sans Fil creates fantally and lifusion utilizing glant puppets inspired by the classical technique of Japanese Bunraku theatre, united with original and modern set design, lighting, and music composed by musicians familiar with the art of puppetry.

Theatre Sans Fil means "theater without strings."

Theatre Sans Fil means "theater without strings."

Theatre Sans Fil has given more than 3000 performances and brought close to three million spectations from more than 20 countries and four contribution into the fantastic and enchanted worth of its productions.

Fantally, poetry, make-believe and magic have a ways figured strongly in TSFs texts, along with unusual and heroic characters. J.R.R. Tolkich's "The Hobbit" was created in 1979 and became an instant international success, including playing to sold-out houses at the 1984 Oympics.

#### Resource Links

Buy Tickets (http://www.trebarctey.org/custom/events/events/o-asp?event/O=1247)

J. R. R. Tolk in from the wilk bedia org Wik (Tolkien)

The Bardary's 20-20-20 Sea son (into //ptch.per/18237)

The Hobbit into //en wilk pedia org wik / The Hobbit of the control of the control

#### Tags

hobbit, Tolkein, Lord of the Rings puppet, puppetry, theater drama, chibiren, invine, Barolay, Theatre

#### Embed VIa Docs too

Emitied: ⊲object id="\_ds\_1004248 URL: http://www.docstoc.com/c

#### More Irvine Barclay Theatre News

Celebrate Valentine's Day with some of the world's most romanto music and artis (may know ptokengine confocebrosev alemines-day-with-some-of-the-worlds-most-comente music-and-bis-SSQ17/)
Day to Sed arts in soid out appearance at invine Bairolay The atre (http://www.ptokengine.com/day-of-sed/arts-in-soid-out-appearance-at-invine-barcity-treat\*e/DSSQ1/)
A "Ni Feliss" journey through one of the most famous high wire capers in the world (mtp://www.ptokengine.com/s-wireless-journey-through-one of the most-bmous-high-wire-capers-in-the-world/DSSQ1/)
Glorbus music and dance, stories and Buighter, and plenty of irish soul (mtp://www.ptokengine.com/sionious-music-and-diance-stories-and-buigher-and-plenty-of-insh-soul/SSQ2)



Torin Gandolph, Blibo and the elves The banquet

http://www.pitchengine.com/free-release.php?id=21617

## ATTACHMENT K

# Irvine Barclay Theatre 20<sup>th</sup> Season Chinese Press Release published on

### **International Daily News**

27日國際日報-工商新聞 - 國際日報

Page 2 of 3



http://www.chinesetoday.com/news/show/id/292183

### ATTACHMENT L

### The 20<sup>th</sup> Season Ads on Los Angeles Times



# ATTACHMENT M

The 20<sup>th</sup> Season Ticket Sales Tracking

	90	(150)				98 EST.														12)		36	
	Varian					3,698														(1,712)		1,836	
Seats	FM Actual	18,600				25,000														18,952			
'90% = 666 Seats	TM Gross TM Actual Variance	18,750	16,774	18,112	26,640	21,302	18,750	17,474	NA	16,774	16,774	19,388	18,112	20,664	18,050	14,160	20,026	18,750	N/A	20,664	NA	321,164	323,000
Gold Seat	Price	100.00	75.00	100.00	NIA	100.00	100.00	100.00	NA	75.00	75.00	100,001	100.001	100.00	75.00	20.00	100.00	100.001	N/A	100.00	N/A		Tracking:
Adjusted for Hobbit Gold Seat	2 shows	22.00	20.00	21.00	34.00	26.00	22.00	20.00	N/A	20.00	20.00	23.00	21.00	25.00	22.00	17.00	24.00	22.00	N/A	25.00	N/A		22.59
		22.00	20.00	21.00	17.00	26.00	22.00	20.00	17.00	20.00	20.00	23.00	21.00	25.00	22.00	17.00	24.00	22.00	22.00	25.00	18.00		
	Full Price Less FPF	25.00	23.00	24.00	20.00	29.00	25.00	23.00	20.00	23.00	23.00	26.00	24.00	28.00	25.00	20.00	27.00	25.00	25.00	28.00	21.00		
20th Season Progr 20th Season Ticket Sales Tracking		Virsky Ukranian National Dance Company	Bill T. Jones/Arnie Zana Dance Company	The Korea Society/Young San Group*	Theatre Sans Fil: The Habbit	David Sedaris	Philippe Petit	Talis Scholars	Festival Ballet: The Nutcracker (opening night)	Grupo de Rua	Akram Kahn Dance Company: Bahok	Masters of Persian Music	Max Raabe & Palaster Orchester	Alberta Ballet	Abbey Road	Christopher O'Riley	Arlo Guthrie	Dulsori	Long Beach Opera	Preservation Hall Jazz Band	National Choreographers Initiative		
ason Prog		3 Sun	/9 Fri	10/10 Sat	10/24 Sat	10/27 Tue	11/28 Sat	uns 9/	12/11 Fri	en Tue	an_ (	12 Fri	Ned 71	25 Thu	DeW OI	) Fri	12 Sat	Sat	15 Sat	Fri E	St Sat		
th Sea		9/13	10/9	100	10/	101	11,	12/6	12	1/16	2/9	2/12	2/17	2/25	3/10	4/9	4/17	5/8	5/15	7/9	7/31		

### ATTACHMENT N

### **Ticket Order Form Sample**

Ticketing Agreement Revised: August 2005



Barclay Box Office 4242 Campus Drive in Irvine - (949) 854-4646 www.thebarday.org tickets@thebarday.org

The following information is necessary in order to program the ticketing software and print tickets for the Licensee's event. Please fill out this form and return to the box office at least one month before tickets are

to go on sale. Ticket prices must include the Facility Preservation Fund Fee described in your contract.

\$2 per ticket (to be built into printed ticket price) if base ticket price is set below \$15.00. \$3 per licket (to be "built into" printed ticket price) if base ticket price is set at \$15.00 - \$39.99. \$4 per ticket (to be "built into" printed ticket price) if base ticket price is set at \$40.00 or above. Complete this form and return to the Box Office Manager: Mail to: Barclay Box Office Fax to: (949) 854-8490 Email to: tickets@thebarclay.org PO Box 5846 Irvine, CA 92616-5646 Organization Name: **Ticketing Contact:** Address: Telephone (day): Telephone (eve): Emall address: Date tickets go on sale (mm/dd/yy): TICKET PRINTING INFORMATION: (2 lines containing a maximum of 26 characters each - including spaces) Event Date(s): TICKET PRICING: If pricing is scaled by section, seating area, day of week, etc., mark the attached seating map for price zones. Call the Box Office Manager at (949) 854-4195 x201 for more information or Price 1 Price 2 Price 3 Row Ns Section Full Price: Adult Standard Discounts: Full-time Students All children, including infants, need a ticket in Child (age range) the seating area. Seniors (60+) Rush Groups (min. size)\_

Other discounts (explain)

### **ATTACHMENT O**

### "Adventure in Writing" Entry Form Sample

Adventures A Short Story	inl	Vriting
spare	sored by clay Theatre	
thors ages 8-12! Here's a chance own characters by writing your	Prizes	All finalists will have the

Attention young authors ages 8-12! Here's a chance to create your very own characters by writing your own fantastic story. Use your imagination. Maybe you'll even want to star in your own story!

Theme:

An Unexpected Journey.

Eligibility:

Open to girls and boys, ages 8 to 12, who are residents of Orange County. Previous

finalists are inaligible.

Content:

Using any of your favorite stones as inspiration, write a story in which the main character (or characters) takes an unexpected journey and perhaps learns a valuable lesson. Each writer should apply the various creative espects found in literature (for example; character, plot, setting, rising action, conflict, resolution...) Each story should include a title.

Length:

Two to five typed pages (legible crinting is acceptable). The story must be double-spaced on plain white paper (one side only) or printed healty on fined 8 1/2 x 11 paper (one side only).

,

Deadline:

The contest will run from November 5, 2007 - February 25, 2008. All entries must be submitted by email to: story.contest@thebarclay.org or turned in at one of Orange County Public Library's 33 branches by closing on February 25, 2008.

All entries should have a completed entry form attached and include name, address phone number, age, grade, and school.

BARCLAY www.thebarclay.org

All finalists will have their stories copied, illustrated and bound into a book. One copy of the book will be placed on the shelves of each of the 33 Library branches. Each finalist will receive a copy of the book and a certificate to show that his or ner story has been published and placed in the library. Each finalist's school will also get a copy of the book. Additional copies for family and friends will be available through Irvine Barclay Theatrie for \$15.

Winners will be notified by March 25, 2008.

A took signing and reception will be held to honor the final sts in May of 2008. At that time, the young authors may read aloud an except from their story.

\*\* All entries become the property of Orange County Public Library and Irvine Barolay Theatre\*\*

For more information please contact Peggy Magee at: magee@thebarclay.org

Major support provided by: The Allergan Foundation The Fieldstone Foundation Ford Mater Company Fund

Ronald M. Simon Family Foundation Ben & Cheryl Trosky

Wells Fargo Foundation

OCPL - Orange County Public Library

Adventures	in	Writing	Short Story	Contest	for Kids	- Entr	y Form
Havemures	in	wring	Short Story	Contest	for Kids	- Entr	y Form

	deading red as 2000
lame	Age
Address	Grade
City	School
State Zipcoda	Teacher
Email	OCPL Library Branch
Phone ( )	All entries become the property of the Crange County Public Library and Invine Barday Theatre

# ATTACHMENT P

# The 20<sup>th</sup> Season Roster



### **ATTACHMENT Q**

### **Irvine Barclay Theatre Official Website**

Irvine Barday Theatre the barclay



WHATS

#### What's New

The Barclay - What's New

It's hard for us to believe that the time is already here.



Look for events marked 20-20-20 in the calendar. At these prices, tickets are going really fast. So don't wait too long!

Sept 13 kloks off the 20-20-20 Season with the romance and pession of the Ukraine. The 80 artists of <u>Virisky Ukraintan</u>
National Dance Company present an existing performance
of bravure danding and music at its best.

Sept 12 is a special performance of the highly-acclaimed play Beneath the Vell -- presenting an eye-opening collage of the vidices and lideas of women from the Middle East.

Oct 9 is the southern California premiere of Bill T. Jones muchanticipated new work. Fondly Do We Hope...Fervently Do We Pray. A 20-20-20 event this is an investigation and celebration of Abraham Uncoin commissioned for the bicentennial of his birth.

Oct 10 brings a rare and beautiful presentation of Buddhist ritual music and dence of Korea. The Sound of Ecstasy, presents dements of the treasured Young San Ceremony performed by monks who have trained for years to learn its

See the Callendar for a complete list of events.



Page 1 of 1



NEXTO the barclay Find out more about our group for young professionals.



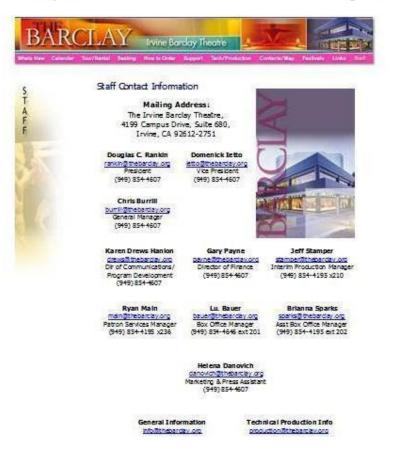
Area Hotel Guide

http://www.thebarclay.org/

10/18/2009

The Website Home Page

The Barclay - Staff Page 1 of 1



http://www.thebarclay.org/staff.asp

10/18/2009

The Staff Web Page