Holding the Spotlight When the World has Gone Dark

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Holding the Spotlight When the World has Gone Dark

A Thesis

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

Master of Arts
in
Arts Administration

by
Hannah Alikhani
B.A. California State University, Chico, 2016
May 2021
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ABSTRACT

The COVID-19 pandemic has had dramatic effects throughout the economy, but few industries have been hit harder than the performing arts. Theatres face unique challenges, including lost earned and contributed revenue, navigating virtual platforms, and how to sustain their audiences, who are distant both physically and mentally. This study seeks to explore the ways in which three mid-size nonprofit theatres work to overcome these challenges and adapt to the new and ever-changing landscape of live performance. At the same time, the Black Lives Matter movement and the demand for more equity across institutions of all types have placed additional social pressures on live performance venues. This has compounded the economic strain from the pandemic, as these venues seek to reinvent and revitalize their programs. This study compares fiscal concerns, organizational changes, programming innovation, and other strategies used to withstand the pandemic, while also examining an equitable path forward for these organizations.

Keywords: Theatre, Performing Arts, COVID-19, Black Lives Matter, Virtual programming
CHAPTER 1

INTRODUCTION

Theatre has existed nearly since the birth of humanity. Personal expression and storytelling have been the basis of human connection for thousands of years, providing opportunity for understanding across generations, races, cultures, and classes. As we have seen throughout history, the arts are often called upon during times of catastrophe, disaster, and upheaval to reaffirm, revitalize, and reconstruct their communities, as seen following the AIDS epidemic, the terrorist attacks of 9/11 and the Spanish Flu as just three examples. The age-old practice of sharing experiences and emotions through performance has the potential to be even more vital during the 2020 COVID-19 pandemic, as communities have been separated, isolated, and detached for nearly a year. As theatres around the country struggle to remain in operation, this study seeks to explore the ways in which three mid-size theatres, Southern Rep Theatre in New Orleans, Louisiana, Actor’s Express in Atlanta, Georgia, and InterAct Theatre Company in Philadelphia, Pennsylvania are continuing to maintain their connection to patrons and even thrive by employing innovative strategies and reaffirming their missions. Three main areas of research have evolved: financial restructuring, programming analysis, and alignment to mission and purpose.

Background

According to a report by the National Endowment for the Arts,

Arts and culture contributes 4.5% of the annual national GDP through direct economic activity and 3.4% of the total work force. The value the arts add to the U.S. economy ($877.8 billion in 2017) is five times larger than that added by agriculture, and $265 billion larger than that of transportation and warehousing. (Guibert & Hyde, 2021)
A closer look reveals the performing arts, in particular, contribute approximately $14 billion to the economy annually, and more than 122,000 jobs. This report further highlights that the unemployment rate for performing artists and professionals has more than doubled since 2019 as a result of the pandemic, with actors, dancers, and choreographers hovering above 50% unemployment. This rate is significantly higher than the national unemployment rate, which peaked at 14.8% in April 2020 (Congressional Research Service, 2021).

These unemployment numbers track with the decline in revenue experienced by the performing arts sector since the start of the pandemic, estimated to be 54% in the 3rd quarter of 2020 (NEA Office of Research and Analysis, June 2020). Funding for the Performing Arts comes from a variety of sources, with ticket sales (earned income) making up the largest percentage at more than 50%. Contributed income, (donations and corporate contribution/sponsorship) is 33%, and government funding and grants makes up the rest (NEA Office of Research and Analysis, June 2020). With COVID-19 mandates prohibiting or restricting live, in-person events (earned income) and a decline in contributed income, the devastating impact on theaters, and performing arts in general, becomes obvious.

Every major American city has established COVID-19 protocols regarding live, in-person events, calling for anything from severely limited attendance to cancellations. While the full effects of this pandemic cannot fully be calculated at this time as almost all cities in the United States are still fighting to gain control over the spread of the virus, we are already beginning to see its effects on nonprofit arts organizations. As of January 2021, the National Endowment for the Arts reports the nonprofit arts sector has lost over $1.6 billion in revenue as a result of the pandemic and its restrictions (Americans for the Arts, 2020). Although the median financial impact per organization is stated as only $30,000, this number reflects the negative
impact spanning across organizations of varying size, therefore it is within reason to consider that many of these arts organizations will not survive this pandemic, and most will face lasting impacts for years to come (Americans for the Arts, 2020).

Scrambling to maintain operations, most nonprofit theaters were forced to completely reevaluate their programming, swiftly pivoting to new ways to stay connected with their audiences. The introduction of virtual/distance programming quickly became part of the “new normal”. While there is no national data available at this time, a small study conducted by ArtsFund in the Central Puget Sound Region, focusing on 47 organizations, found that 100% of participating theatres have switched, or are planning to switch, to digital programming, 52% of which are not charging admission. Additionally, this study found 91% of the organizations surveyed have introduced new programming offerings in an attempt to remain viable (ArtsFund, 2020).

Adding to the devastating financial and economic effects of the pandemic, recent social-cultural events have magnified these pressures. The Black Lives Matter movement (BLM), which began organizing protests in May 2020 in response to the deaths of Breonna Taylor and George Floyd at the hands of law enforcement, caused the spotlight to turn toward social injustice and racial disparities across all business sectors. Amid government shutdowns and mandated social distancing, supporters of BLM rallied in the streets to make their voices heard in response to recent police violence. During this time the performing arts and theatres were called upon, not only to take a position on the controversies, but to support and serve as spaces where artists of color could share their pain and their work to illuminate audiences on the experience of Black Indigenous People of Color (BIPOC), both within arts spaces and in the streets.
Theatres have worked tirelessly over the past year to navigate the ever-shifting world, while striving to remain hubs of culture and communication within their communities. This delicate balance of staying afloat and riding the waves in these turbulent times, to survive the storm, is the focus of this study.

**Statement of the Problem**

How do arts nonprofits maintain operation during an economic crisis, while also attending to the cultural shifts occurring simultaneously within their communities? Nonprofit theatres provide more than just economic output and employment within a community; they offer an outlet for reflection of the broader societal narratives through mainstage performances and an array of services, including new work cultivation and arts education opportunities, all integral to a healthy community. This study seeks to provide strategies for performing arts venues, similar to those examined, to maintain operations and gain financial stability and relevance in a time when their community is in crisis.

According to the Association of Fundraising Professionals, nonprofit organizations have seen a significant decrease in donations received since the beginning of the COVID-19 pandemic, collectively totaling over $25 billion lost (The Association of Fundraising Professionals, 2020). Faced with this loss of income, financial instability quickly became a threat to many smaller arts organizations, forcing them to find new ways to generate income. Adding to the fiscal dangers of waning revenues, arts organizations were also confronted by social and cultural pressures to change their focus and practices at a time when they may have been least prepared for it. The social unrest and growing support of the Black Lives Matter movement following the murder of George Floyd in May 2020 became an “anchor” with which many arts organizations could steady their ships, as local BIPOC artists called on them for
support, bringing renewed purpose to their organizations. Arts organizations, particularly the performing arts, have a long history of engaging with social justice movements, serving as a space for artists to express their experiences, call on their community for support, and educate the broader audiences. BLM and COVID-19 acted in tandem to put stress on arts organization, as well as give them a reason to survive. Each of these challenges demonstrates the value of provocative, professional storytelling and community engagement, and deserves study and documentation. If professionals in the field can define what strategies are most effective in aiding organizational survival, more organizations can enact the tools necessary to thrive in the most uncertain times.

**Research Questions**

Research Proposition - How do nonprofit theatres survive and adapt to changes caused by the COVID-19 pandemic and address the needs of their communities surrounding the Black Lives Matter movement when the very nature of their survival depends on the support, proximity, and engagement of their audiences?

Research Questions:

A: What role does a drastic, unanticipated decrease in revenue, both earned and contributed, play in the survival of nonprofit theatres during a national crisis?

B: What role does a small theatre’s ability to adapt programming to new technology, platforms, and community calls for action play in the survival of the organization?

C: What role do political, social, and cultural pressures play in determining an arts organization’s response to converging fiscal and social crisis occurring at the same time?
Definitions of Terms

*Audience Retention* - The percentage of people (audiences) who return from one year to the next (Metzner, 2017).


*Black Lives Matter (BLM)* – An international social movement, formed in the United States in 2013, dedicated to fighting racism and anti-Black violence, especially in the form of police brutality. The name Black Lives Matter signals condemnation of the unjust killings of Black people by police (Black people are far more likely to be killed by police in the United States than white people) and the demand that society value the lives and humanity of Black people as much as it values the lives and humanity of white people (Britannica, 2013) (Edwards, Lee, & Esposito, 2019).

*Contributed Income* – Refers to gifts made freely without receiving any goods or services in exchange. Donations, grants, and noncash donations are examples of contributed revenue (Hughes, 2021)

*Earned Income* – The revenue generated from the sale of goods, services rendered, or work performed (Candid, n.d.)

*Main Stage* - The largest (and hence most prestigious) stage in a theatre complex, performance venue, or outdoor event (such as a music festival); frequently attributive (Lexico.com, n.d.).

*Intelligent Verbatim Transcription* - the process of converting any type of recorded speech into text format and cutting out any redundant phrases and words (Transcription Wave, 2012).
Research Limitations

While it is understood the current COVID-19 pandemic affects the larger scope of the performing arts, this study was limited to a small sample of active nonprofit theatres in major metropolitan cities supported by budgets between $800,000 to $1.4 million. Further defining selection is the similar focus of each organization on new play development and a commitment to diversity and the shared experiences and values of their communities. The pressures of budget reduction and mission alignment are at play in forming the organizations’ responses, both from COVID-19 and the social and cultural changes taking place in the year since the pandemic began.

The case study research was obtained through online, virtual Zoom meeting interviews conducted with the Artistic Directors from each organization. This arrangement was limited by the time constraints of the participants and did not always allow for the same depth of response that may have been achieved using written questions and a less restrictive timeline.

The COVID-19 pandemic and related restrictions and impacts are still unfolding at the time of this writing; therefore, conclusions are based on the current state of each organization’s response to the crisis at the time of the interview. Continuing uncertainty surrounding the long-term effects of the pandemic will no doubt influence future decision-making, and potential outcomes for these organizations.

Research Assumptions

In this study it is assumed all participants answered truthfully and to the best of their ability.
CHAPTER 2

LITERATURE REVIEW

In an effort to give a clear picture of the effects COVID-19 has had on the performing arts, a baseline of theatre trends needs to be established. According to *All America’s a Stage: Growth and Challenges in Nonprofit Theatre*, a report released by the National Endowment for the Arts published in 2005, theatre trends tend to follow business cycles, fluctuating drastically when the economy is suffering, such as during the 2001 recession when theatre revenues sunk nearly 12%. While this report is over 15 years old, it tells the story of flattening, declining, or increasing audience numbers which mirror economic changes. This observation can be applied to the current economic impact of COVID-19 (National Endowment for the Arts, 2005).

A more current picture (prior to the COVID-19 pandemic) can be seen in the Theatre Communications Group’s “Theatre Facts”, an annual report on the fiscal state of the U.S. professional, not-for-profit theatre field. In the 2018 report, informed by the survey of 119 theatres, individual ticket sales rose, continuing a trend started in 2015; however, subscription tickets were at a five-year low. The average theatre capacity was 62% for paying audiences. Total attendance was down 2.5% over the same five-year period compared to previous year’s total attendance numbers, with the highest attendance numbers occurring in 2016, and have since trended downward. This downward trend corresponded with a decline in total number of performances, which have steadily deteriorated since 2015 (Voss, Voss, Fonner, Rose, & Baskin, 2019).

**Performing Arts Response to Historic Events**

Prior to considering the effects of the current pandemic on the performing arts we must consider the historic response of the arts and live-performance venues when grappling with past events. Tragedy often begets creation. This is exemplified in the New York performing arts
sector’s response amid the AIDS crisis of the 1980s and 90s. An article published by Playbill, *Three Decades, Countless Deaths and a Lifetime of Change: The Theatre Community’s Fight Against AIDS*, details how the AIDS epidemic spawned the creation of its own theatrical sub-genre, while also cultivating a network and community of theatre-makers and -lovers who cared for those affected by AIDS.

You would go into a rehearsal period, and before you could get to previews, people would have disappeared. People would've gotten sick and landed in the hospital — possibly to come out, possibly not. – Tom Viola, Executive Director at Broadway Cares/Equity Fights AIDS (Grunfeld, 2015)

The artists’ response to this epidemic was to create works that captured the pain and loss many of those in the theatre community had suffered. Plays and musicals were created that focused on this disease’s wide-spread effect and works intended to restore humanity to those infected. Between 1985 and 1996 a number of productions arose around the AIDS crisis, from *The Normal Heart*, to *Rent*, to *Angels in America*; all shows which remain relevant in the current theatrical landscape.

Arts organizations jumped into action as the AIDS crisis raged. Tom Viola teamed with other members of the community to create Equity Fights AIDS, which later merged with Broadway Cares. Broadway Cares/Equity Fights AIDS became a nationally known organization whose focus is to engage the entertainment industry to raise money, and provide public support, for HIV/AIDS causes, as well as contribute to the Actor’s Fund. This work has not only created amazing art for the theatre community but has also worked to remove the stigma surrounding the LGBTQIA+ community and those affected by AIDS (Broadway Cares/Equity Fights AIDS, 2010).
Less than a decade after the AIDS epidemic, America was forced to face another major event, the terrorist attacks of September 11, 2001. *American Theatre* provides an overview as to how theatres in New York City responded to the crisis as all productions were halted as a result of the attacks on the Twin Towers. Broadway and off-Broadway shows were forced to cope with declining attendance and ticket sales, resulting in many smaller New York theatre productions coming to an end (Jones, How the Shows Went On After 9/11, With an Assist From Ovid, 2018).

Just days after the 9/11 attack, on September 13, 2001, all 23 Broadway theatres began to reopen, welcoming crowds and offering space for audiences to remove themselves from the chaos outside the theatre doors. Most shows only hosted half-full theatres, leading to a large financial loss for the arts in the following weeks. Of course, most Broadway shows were financially stable enough to weather this storm, especially with assistance from the city which provided millions in funds and marketing; but off-Broadway productions and smaller nonprofit theatres were not as lucky.

Downtown theatres, who were often very near to Ground Zero, were feeling the largest effects of this disaster and receiving very little aid. Scott Morfee, producer at the SoHo Theatre which served as a resting place for many of the rescue workers, had this to say in regard to the treatment of off-Broadway theatres following 9/11: "The branding of Broadway to the exclusion of Off-Broadway and Off-Off-Broadway was offensive to me. It was sort of saying to everyone else, 'You're not in on this'." This delineation of worth by a theatre’s ability to make money gives a clear view of the lack of support small theatres have historically received in times of need. Much of the focus is placed on Broadway, or other major for-profit theatres, when tragedy strikes, leaving the theatres with smaller audiences to struggle (Pogrebin, 2002) (Jones, How the Shows Went On After 9/11, with an Assist from Ovid, 2018)
In light of the current pandemic, American Theatre also examined the response to the Spanish Flu, a wide-spread disease which overtook America in September 1918. Very similar to the current COVID-19 pandemic, during the Spanish Flu much of the country entered periods of quarantine. During this time playhouses were cultural centers, and their closures made front page news. The article states, “Even when people knew in advance the closures were imminent and that deaths were surging, they didn’t relinquish theatregoing easily” (Canning, 2020).

Theatres nationally suffered tremendous losses during this time, as noted in Philadelphia’s The Evening Bulletin headline, “Loss to Theatres by Closing, $200,000.” In 2021 that amount of lost revenue amounts to about $3.5 million in today’s dollar (Canning, 2020). But following this horrific period of death and loss many noted that the theatre world returned as quickly as it had left, reverting to mostly normal operations by 1919. In this context we can understand how major events can greatly affect the ways theatres operate, and how they can move forward following historical crisis.

**COVID-19 Impact on the Performing Arts**

In examining the impacts of the COVID-19 pandemic on the performing arts much of the information has been gathered and distributed by the National Endowment for the Arts (NEA). In a report published by NEA in January of 2021, the most current picture of how the performing arts have suffered during the pandemic, outlines an unemployment rate that has more than doubled for arts professionals when compared to previous years, along with charts detailing the loss in revenue for performing arts events (Guibert & Hyde, 2021). These statistics become even more staggering when compared to the general unemployment rates as provided by the Congressional Research Service, which lists the unemployment rate throughout the pandemic between 6.7% and 14.8% (Congressional Research Service, 2021).
Americans for the Arts provides a current snapshot of the impact of COVID-19 on arts organizations using the “The Economic Impact of Coronavirus on the Arts and Culture Sector” tool on their website. According to this tool, the financial impact for all arts organizations nationwide is over $1,749,000,000 as of November 2020. This median impact per organization is listed at $30,000, with 66% expecting severe financial impacts and 11% unsure of their ability to survive this financial stress. Each of these numbers is corroborated in the relevant states, delineated in the table below, and only covers the first eight months of the pandemic. It is expected these losses will continue to grow throughout the coming year. Larger theaters within these states may experience losses far greater than the median (Americans for the Arts, 2020).

<table>
<thead>
<tr>
<th>% of cancelled events*</th>
<th>Total dollars lost*</th>
<th>Median financial impact (per organization)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Louisiana</td>
<td>97%</td>
<td>$9.2 million</td>
</tr>
<tr>
<td>Georgia</td>
<td>96%</td>
<td>$16.4 million</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>95%</td>
<td>$48.6 million</td>
</tr>
</tbody>
</table>

*All numbers were gathered in November 2020 (Americans for the Arts, 2020)

**COVID-19 Event Regulations**

Research surrounding the impacts of COVID-19 on the performing arts, must also include state and government mandates, regulations, and restrictions limiting theatres and other performing arts institutions. The Center for Disease Control (CDC) has released specific guidelines and suggestions concerning events and gatherings, which impact a performance organization’s ability to host in-person productions safely. According to the CDC guidelines, updated November 2020, event layouts should be modified to provide for limited seating capacity, multiple entrances, and elimination of queues, while also allowing for social distancing, as well as outdoor or virtual events whenever possible. Additionally, the CDC has provided guidelines for employee regulations at these events, suggesting limiting and staggering shifts.
Beyond national regulations, each theatre must adhere to state and local guidelines, which are accompanied by possible fines if rules are not followed. Throughout this research the study looks at three theatres within the United States, each located in a different major city. New Orleans, Louisiana released regulations in November 2020 regarding “Phase 2 opening” directly affecting Southern Rep Theatre (Southern Rep), one of the research participants. These guidelines set forth by the city of New Orleans are much more specified than the national regulations, providing specific percentages and numbers for capacity, as well as programming limitations. In contrast, when researching guidelines for Atlanta, Georgia, the location of Actor’s Express, each link on the state’s website led back to the CDC guidelines regarding capacity limits and permit requirements. In Philadelphia, Pennsylvania, the location of the InterAct Theatre Company (InterAct), the final theatre examined in this study, has specific regulations of their own, released in October 2020. Additionally, these regulations can change and shift on a weekly basis, making adherence even more challenging. This demonstrates the difficulty theatres have in determining common guidelines and regulations. Regulations for each of the study participants are detailed in the chart below.
<table>
<thead>
<tr>
<th>Location</th>
<th>Event Type</th>
<th>Capacity</th>
<th>Additional guidelines</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Orleans</td>
<td>Indoor</td>
<td>25%, or 75 individuals (whichever is smaller)</td>
<td>• Maintain 6 feet distance&lt;br&gt;• Masks required&lt;br&gt;• Event must be seated and timed</td>
<td>Events involving the following require permits*&lt;br&gt;• Singing&lt;br&gt;• Karaoke&lt;br&gt;• Wind-blown instruments</td>
</tr>
<tr>
<td>Outdoor</td>
<td></td>
<td>25%, or 150 individuals (whichever is smaller)</td>
<td>• Maintain 6 feet distance&lt;br&gt;• Masks required</td>
<td>All events require permits*</td>
</tr>
<tr>
<td>Atlanta</td>
<td>Indoor</td>
<td>-</td>
<td>Following CDC guidelines.</td>
<td>-</td>
</tr>
<tr>
<td>Outdoor</td>
<td></td>
<td>-</td>
<td>Following CDC guidelines.</td>
<td>-</td>
</tr>
<tr>
<td>Philadelphia</td>
<td>Indoor</td>
<td>10% or 250 individuals for venues with capacity 2,000+</td>
<td>• Maintain 6 feet distance&lt;br&gt;• Masks required&lt;br&gt;• Seats must be blocked out to maintain distance.</td>
<td>-</td>
</tr>
<tr>
<td>Outdoor</td>
<td></td>
<td>20% for venues with capacity below 2,000.&lt;br&gt;15% for venues with capacity 2,000-10,000.&lt;br&gt;15% up to 7,500 for venues with capacity 10,000+.</td>
<td>• Maintain 6 feet distance&lt;br&gt;• Masks required&lt;br&gt;• 20 ft between performers and audience&lt;br&gt;• Barriers between performers and audience if 20ft cannot be achieved and performers are not wearing masks.</td>
<td>-</td>
</tr>
</tbody>
</table>

*Live entertainment permits are valid for 10 days.<br>**Performers count towards total capacity.<br>

(NOLA Ready, 2020) (Department of Public Health, City of Philadelphia, 2020)
Performing arts organizations routinely work with several unions throughout a production. Each of these unions has released COVID-19 guidelines of their own, as it has become clear many theatres are still attempting live productions. The Actors’ Equity Association (AEA), which includes actors and stage managers, has stated that for any in-person production, actors, stage managers, and all employees and employers that will be interacting with performers and stage managers must receive a weekly COVID-19 test. These tests must be available at no cost to actors and stage managers, and results must be returned within 48 hours. Each production must submit the “Producer COVID-19 Safety Worksheet” to AEA for approval prior to beginning rehearsals (Actors' Equity Association, 2020). AEA has also released a document detailing the “4 Core Principles Needed to Support Safe & Healthy Theatre Productions” to act as additional guidelines throughout the pandemic. These four principles are:

1. The epidemic must be under control.
2. Individuals who may be infectious must be readily identified and isolated.
3. Venues and productions must be modified to minimize exposure.
4. Efforts to control COVID-19 exposure must be collaborative.

(Michaels, 2020)

Performance venues must also follow any guidelines given for technical crew unions, most commonly International Alliance of Theatrical Stage Employees (IATSE). In the “IATSE Stagecraft Safety Committee Recovery Plan” released by the union in July 2020, the plan details the minimum criteria required for their members to return to work. These guidelines stipulate that venues must have a written COVID-19 safety plan in place, there must be a COVID-19 Compliance Officer with specialized training available to enforce COVID-19 plan compliance, personal protective equipment (PPE) will be supplied by the employer, and additional guidelines
for specific departments (International Alliance of Theatrical Stage Employees, 2020).

As many arts organizations attempted to follow these restrictions, the reality of the inflated costs and time associated became apparent, leading most to opt for virtual programming. To account for the number of productions moving to a virtual format, Actor’s Equity Association reached an agreement with The Screen Actors’ Guild – American Federation of Television and Radio Artists (SAG/AFTRA). A public statement released in partnership from both unions details the guidelines for virtual productions, to remain in effect throughout the “pandemic period” which is set to last until December 2021. This consideration allows AEA artists and SAG/AFTRA artists to work on filmed projects that would traditionally be outside of their contracts (ACTORS’ EQUITY ASSOCIATION AND SAG-AFTRA REACH JOINT AGREEMENT ON LIVE THEATRE RECORDED OR STREAMED FOR EXHIBITION DURING THE PANDEMIC PERIOD, 2020).

**COVID-19 Performing Arts Funding and Relief**

In April 2020, the United States government made emergency funding available to many businesses at the beginning of the COVID-19 pandemic, which included arts organizations. In a message from the National Endowment for the Arts Chairman, Mary Ann Carter, distribution percentages were detailed; Congress appropriated $75 million to the NEA as part of the Coronavirus Aid, Relief, and Economic Security Act (CARES Act), 40% of which was awarded directly to state and regional arts agencies. This money was allocated in order to preserve jobs and provide assistance for arts organization upon their forced closing. Eight hundred and fifty-five arts organizations across the United States have received a total of $44.5 million in funds, which were fully committed within three months (National Endowmen for the Arts, 2021). Arts Endowment Acting Chairman, Ann Eilers, said of the relief:
I am grateful to members of Congress and the president for recognizing the economic and societal contributions of the arts, especially given the recent devastation to the sector. With the agency’s expertise in grantmaking, including with the CARES Act, the Arts Endowment will deliver assistance to allow arts organizations to reopen, to retain as many jobs as possible, and to help sustain the creative life of our communities. (National Endowment for the Arts, 2021)

Round two of the CARES Act added an additional $84 million for the arts, distributed through 1,144 grants across all 50 states. These funds were intended to assist programs in their transition to virtual performance. In March 2021, President Joe Biden allocated an additional $135 million to go toward arts funding as part of the American Rescue Plan (ARP). It is estimated these funds will result in over 234,000 jobs returned and will affect 107 million people across 1,000 communities. The NEA distributes grants through four programs, Art Works, Our Town, Research Grants, and Regional Partnership Agreements (National Endowmen for the Arts, 2021).

The National Independent Venue Association (NIVA), made up of over 3,000 venues in the United Stated, has been advocating for additional relief from the government specifically for performing arts venues. The NIVA website details the many reasons why the Payment Protection Program fails address challenges experienced by the performing arts; it identifies the need for long term support as most venues will be unable to reopen until vaccines are widely available. NIVA also outlines a 3-pronged appeal to representatives:

1. Provide Long-term Assistance for Shuttered Business
2. Relief Through Tax Credits
3. Support for Live Event Workers and Artists
NIVA also advocates for the Save Our Stages Act, a proposal led by Senators John Cornyn and Amy Klobuchar as well as Representatives Peter Welch and Roger Williams, which establishes a $10 billion grant program for live venue operators, promoters, producers and talent representatives (National Independent Venue Association, n.d.).

Additional relief for performing arts venues is coming from the United States Small Business Administration’s Shuttered Venue Operators Grant. This grant program was initially created as part of the Economic Aid to Hard-Hit Small Businesses, Nonprofits, and Venues Act and later revised by the American Rescue Plan Act. This grant program makes over $16 billion in grants available to performing arts venues which were forced to close throughout the pandemic. Provided grants will be for amounts that equal 45% of the venue’s 2019 gross earned revenue, or $10 million, whichever is less (U.S. Small Business Administration, n.d.)

**Civil Unrest in Summer 2020**

The murder of George Floyd occurred on May 26, 2020 in Minneapolis, Minnesota as a result of police brutality. This event led to the convergence of the COVID-19 pandemic with the national uprising of the Black Lives Matter movement as Americans were forced to acknowledge racial inequality from mistreatment by police to mistreatment in healthcare. It was revealed by the CDC that Black Americans are 1.9 times more likely to die from COVID-19 (Center for Disease Control and Prevention, 2021). This entanglement of civil unrest and the concurrent pandemic cannot be separated as the impact each had on the other was significant and is reflected in the study participant’s responses. Each of the theatres studied operated in cities with large Black communities who were greatly impacted by both the pandemic and the protests.
Table 3. City Demographics

<table>
<thead>
<tr>
<th>Location</th>
<th>Population estimates of percent of African-Americans</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Orleans</td>
<td>59.5%</td>
</tr>
<tr>
<td>Atlanta</td>
<td>51%</td>
</tr>
<tr>
<td>Philadelphia</td>
<td>42.1%</td>
</tr>
</tbody>
</table>


**Black Lives Matter and the Theatre Community**

The impact of the summer’s protests and the Black Lives Matter movement as experienced by this study’s participants will be explored in more detail in future chapters, but it is important to, first, understand the general theatre community’s response to this cultural moment. One of the first, and arguably most important, responses to the unjust murder of George Floyd acknowledged by the Arts community was a letter posted by We See You, White American Theater. This letter, penned by a collection of BIPOC theatremakers, made direct charges of systemic discrimination and racism within the industry in which artists of color, particularly black artists, have had to endure. It reiterates after each statement of injustice, the repeating refrain, “We see you”, making it clear that the time for reckoning within the arts industry is upon us. Along with this letter, the “We See You…” website hosts a list of principles, demands, and tenets, along with an accountability report highlighting each of the major theatres who have stepped forward to make public statements in support of the Black Lives Matter movement (We See You, White American Theatre, n.d.).

A prominent response to the Black Lives Matter movement came from Americans for the Arts, which posted their view on the matter on June 1, 2020, just one week following Floyd’s death. The statement is as follows:
Black Lives Matter. Americans for the Arts shares the outrage people across the country are feeling at the deaths of George Floyd, Tony McDade, Breonna Taylor, Ahmaud Arbery, and all the Black victims of systemic racism, police brutality, white supremacy, and oppression. We recognize that we have more work to do. Our organization is committed to learning from and listening to Black voices as we navigate our actions forward. We will continue to advocate for, lift up, and stand beside the artists, cultural activists, and arts professionals who work toward changing long-standing systems of power so that Black people are granted equal privilege and access, and are free from threat and violence. To the Black community: we see you, we hear you, and we support you. (Americans for the Arts, 2020)

This response was mirrored by arts organizations and communities nation-wide, with other prominent theatre’s, like the New York Theatre Workshop and La Jolla Playhouse, making clear their support of BLM.

On a local level, the Pennsylvania Council on the Arts, an organization which oversees one of the theatres examined in this study, released their statement of support which included their strategic plan and cross-cutting value of diversity, equity, and inclusion. A poignant message in this statement is their understanding of theatre’s role in times of community-wide distress,

The art world is a double-edged sword that carries with it both the historical legacy of inequity and privilege, while carrying in its sheath the empathy, unification, healing, and inspiration that creativity affords to all people and across all disciplines. (Pennsylvania Council on the Arts, n.d.)
The overall support in the theatre community for the Black Lives Matter movement is clear, but there are over 480 theaters who have remained silent on this issue. A Google Doc, created by Marie Cisco and audited by other unnamed artists, titled Theatres Not Speaking Out (TNSO) details each of these organizations noting their silence, along with demographic statistics, Artistic Director names, and other pertinent information in an effort to hold these theatres accountable to their artists of color (Cisco).

Summary

This research aims to showcase the challenges faced by nonprofit performing arts organizations just prior, and during to the COVID-19 pandemic coinciding with the Black Lives Matter movement in an effort to forecast how they may emerge on the other side. By illustrating the kinds of barriers and obstacles each theatre must navigate and overcome, a unique picture of the performing arts in 2020 can be painted, from virtual performances, to outdoor experiences, to social justice action, and how each of these new considerations has significant impact on their finances and programming; thus, jeopardizing a future following this global turning point.

Careful consideration was taken when choosing the organizations examined in this research. A synthesis of all information may provide some indication of what American theatre will look like as the world recovers from an unprecedented and devastating year.
CHAPTER 3

METHODS

This study has been conducted using a multiple case study design. The study type was selected for its ability to answer the “how” and “why” questions surrounding the development of strategies used by study participants to ride out the global pandemic and ensuing social unrest. The case study methodology combines the use of a thorough literature review using a variety of data resources, along with primary resources, i.e., participant interviews, related tax information, websites and historic programming to explore and evaluate strategies, program changes, and interventions used by the case study participants. It allows research into several pertinent areas impacting the viability of a theatre during a pandemic, including fiscal survival, programming innovation, and responsibility to the greater community. This criterion is used to “bind” the study to maintain its focus on the participants response to the COVID-19 pandemic and the 2020 summer protests organized by Black Lives Matter. Using this method, each of the examined theatres can be compared to provide a more thorough understanding of the suggested phenomenon. This study looks at each of the participating theatres from an objective point of view, focusing on finding concrete answers to what exists now, and the strategies employed by each toward the goal of fiscal stability and audience retention. By comparing and contrasting study participants’ responses to the phenomenon, it is expected a theme or pattern will begin to develop, and these findings will inform the potential recommendations for future arts organizations experiencing similar circumstances (Baxter & Jack, 2008).

Selection of Sample

The theatres chosen to participate in this study were done so out of accessibility, similar budgets, values, and mission. Southern Rep Theatre was chosen because of its proximity to the author and their existing working relationship. At the time of this study, the author was
employed by Southern Rep Theatre, allowing access to internal documents and figures, as well as relationships with key employees.

Actor’s Express and InterAct Theatre Company were both chosen to participate due to their similarity to Southern Rep Theatre, in their missions, organizational structure, and gross receipts and assets as stated on their 990 tax forms (Appendix A-C). These organizations create and present theatrical works in a way similar to Southern Rep, often focusing on new works and socially conscious productions. All of these factors were considered when deciding on organizations to examine.

Selection criteria was based on participants’ willingness to complete interviews and provide organizational information. Theatres were eliminated from analysis if they did not agree to be interviewed and if their finances were not within similar range to other participants.

**Instrumentation**

Each participating theatre was contacted with the request for an interview with their acting Artistic Directors. Each interview was conducted via a virtual Zoom meeting, lasting between 35 and 40 minutes. Throughout this interview, participants were asked a number of questions about organizational structure prior to the COVID-19 pandemic, as well as current operations, financials, and outlook. These interviews were recorded with permission granted by each participant.

**Data Gathering**

Data for this study was gathered through qualitative participant interviews and quantitative document review, as applicable. To obtain interviews from participating theatres, each Artistic Director was contacted via email with a formal request, and was asked to provide financial, programmatic, and community information about their organization.
Supporting data was gathered through additional research in academic studies, government supported reports, and online articles.

**Data Analysis**

Following these interviews, the recordings were transcribed manually by the author. Each of these interviews were transcribed using intelligent verbatim transcription. Once transcribed the interviews were analyzed using thematic analysis, revealing patterns and repetition of discussed topics in an effort to extract common themes (Appendix D).
CHAPTER 4

RESULTS

Purpose of the study

The purpose of this study is to examine the strategies put in place by nonprofit theatre companies during the COVID-19 pandemic and Black Lives Matter awakening used to mitigate revenue loss and limited community engagement. The goal is to provide information for consideration by similar organizations on how to navigate wide-spread financial and operational challenges. The question this study looks to answer is how nonprofit theatres survive the COVID-19 pandemic, including questions of decreased revenue, adapting work to an online virtual format, and whether the works presented by the examined theatres were chosen to reflect the current social climate, and how these decisions has impacted their audience attendance.

SOUTHERN REP THEATRE OVERVIEW

Mission and History

Southern Rep Theatre was founded in 1986 by Dr. Rosemary O’Neill and has been a mainstay of New Orleans theatre for over 30 years. The theatre’s mission is,

…to develop and produce new plays that reflect the diversity of the city it calls home, to provide our audience with professional theatre of the highest artistic quality and achievement, and to establish a creative working environment that nurtures theatre professionals. As New Orleans’ leading nonprofit professional theatre, we strive to use the artistry of theatre to enlighten, educate, and entertain audiences, and further extend that service through educational and outreach programs. Southern Rep Theatre actively seeks opportunities to engage with ideas, cultures, traditions, and people that reflect the diversity of our world in order to create relevant, visceral and authentic theatre experiences for our community. Our commitment to Equity, Diversity and Inclusion is
reflected in ALL of our artistic and administrative practices. (Southern Rep Theatre, 2020)

Southern Rep’s mission has been refined and enacted over the organization’s history, beginning with O’Neill, who created Southern Rep with the hope to recognize Southern playwrights and celebrate Southern heritage. In the decades since, Southern Rep has brought Southern works to stages in Moscow, Russia, The Sarbonne in Paris, France, and Tbilisi, Georgia; as well as established the annual Southern New Plays Festival, now called The New Play Bacchanal (Southern Rep Theatre, 2020).

In the years following O’Neill’s departure from the organization in 2002 there have only been two other artistic directors, Ryan Rilette (2002-2007) and Aimée Hayes (2007-2020). Under this more recent leadership, Southern Rep shifted focus from international endeavors to establishing their little theatre on Canal Street as a home for new work in the South. In 2012 Southern Rep left their permanent space to become a roaming theatre group, finding short-term rentals for each production, culminating in a residency at Loyola University in 2017. The following year the organization was financially stable enough to move to their current home at the St. Rose De Lima church on the historic Bayou Road (Southern Rep Theatre, 2020).

Southern Rep hosts a number of programs, including a Mainstage season, cabaret series, new play development, and a “School to Stage Pipeline” of Arts Education and Professional Development Programs. The theatre is recognized as an award-winning, critically acclaimed establishment, producing shows that range from world premieres, Broadway and off-Broadway staples, and classic plays (Southern Rep Theatre, 2020; Southern Rep Theatre, 2020).

A key tenant of Southern Rep’s programming is a commitment to promote a vibrant and inclusive community, to raise the quality of life for city residents, and to grow the New Orleans’
reputation as a hub for art. This goal is achieved through pre- and post-show talkbacks, lobby installations, and special events.

Beyond audience cultivation, Southern Rep strives to be a resource for community creatives, stating,

Southern Rep serves as a resource for emerging playwrights, performers, and other theatre professionals in the Gulf South with a commitment to new play development and developing professional artists. We offer opportunities for them to explore their craft, and publicly showcase their work – all important and rare opportunities that ‘untested’ playwrights, directors, and performers require to advance their careers. (Southern Rep Theatre, 2020)

**Southern Rep Theatre Finances**

**TABLE 4. Southern Rep Theatre’s Earned and Donated Revenue***

<table>
<thead>
<tr>
<th>Year</th>
<th>Contributions &amp; Grants</th>
<th>Program Service Revenue</th>
<th>Investment Income</th>
<th>Other Revenue</th>
<th>Total Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>$290,197</td>
<td>$215,616</td>
<td>$415</td>
<td>$272,165</td>
<td>$778,393</td>
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<tr>
<td>2018</td>
<td>$399,456</td>
<td>$249,142</td>
<td>$168</td>
<td>$95,158</td>
<td>$743,924</td>
</tr>
<tr>
<td>2019</td>
<td>$559,176</td>
<td>$290,351</td>
<td>$272</td>
<td>$76,366</td>
<td>$926,165</td>
</tr>
</tbody>
</table>

(Department of the Treasury Internal Revenue Service, 2017) (Department of the Treasury Internal Revenue Service, 2018) (Department of the Treasury Internal Revenue Service, 2019)

**TABLE 5. Southern Rep Theatre’s Expenses***

<table>
<thead>
<tr>
<th>Year</th>
<th>Salaries &amp; Other Compensations</th>
<th>Fundraising Expenses</th>
<th>Other Expenses</th>
<th>Total Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>$311,570</td>
<td>$0</td>
<td>$394,583</td>
<td>$706,153</td>
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<td>2018</td>
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<td>$415,196</td>
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<tr>
<td>2019</td>
<td>$528,081</td>
<td>$55,797</td>
<td>$691,733</td>
<td>$1,219,814</td>
</tr>
</tbody>
</table>

(Department of the Treasury Internal Revenue Service, 2017) (Department of the Treasury Internal Revenue Service, 2018) (Department of the Treasury Internal Revenue Service, 2019)

*Requests for updated financial information, to include 2020 and projections for 2021 were made. At the time of submission, no additional information was provided.
Financial Analysis

Southern Rep Theatre’s annual operating budget prior to the 2019-2020 fiscal year varied between $800,000 to $1.4 million. In the midst of their 2019-2020 season, Southern Rep grappled with a major financial decline, resulting in a 2020-2021 fiscal year budget of $210,000. As of Southern Rep’s 2019 990 Tax Forms, their total amount in assets amounted to -$68,132, compounding the hardships experienced. This drastic drop in available funds resulted in cuts to staff and programming which was then compounded by the COVID-19 pandemic’s effects.

While speaking with Southern Rep’s Artistic Coordinator Sacha Grandoit, she stated a key factor in the financial instability was Southern Rep’s move to the former St. Rose de Lima church in New Orleans in 2018, a space procured through a long-term lease, which boasts a hefty monthly rent much higher than their recent per-production rentals. This cost has exceeded the capacity of the organization’s current budget. While this move originally signaled financial success, the organization has been unable to maintain and increase financial support from its individual donors, or foundation and corporate funders to afford the space.

Southern Rep Theatre did receive some relief from the United States government through a Paycheck Protection Program Loan granted via the CARES Act, which provided the theatre $103,700 which allowed them to remain in operation, with their reduced staff, through the summer months. Unfortunately, they have been unable to regain a positive financial standing even with the government aid. Like many theatres, Southern Rep used these funds to cover immediate paycheck costs and are now searching for additional forms of funding.

Each of the theatres examined in this study expressed their organization’s heavy reliance on contributed revenue versus earned revenue. While hosting programming offers an opportunity for earned income (ticket sales), nonprofit theatre productions rarely break even, 2018 data
stating nearly half of all non-profit theatres report a negative change in unrestricted net asset (Voss, Voss, Fonner, Rose, & Baskin, 2019). As discussed earlier, the financial make up of a nonprofit theatre includes this earned income as well as donor contributions, corporate sponsorship, and government funding and grants. This can be seen in Table 4 (above) as Southern Rep’s total income was about 50% contributions and grants, and 50% program service revenue. In recent years income has trended even more heavily on donations, a trend which is repeated in both Actor’s Express’ and InterAct’s finances. The decrease in earned revenue from lack of programming due to COVID-19 is putting an even larger reliance on contributed income.

Southern Rep’s financial situation, and 2020 season, were tenuous even before the COVID-19 closures. In February 2020 Southern Rep Theatre launched a GoFundMe campaign seeking $350,000 needed to remain in operation. In tandem with this campaign, direct donation requests from individual long-term donors increased, and the GoFundMe campaign remains active as the main source of donations to the organization today. Donations, which came in quickly at first, began to dwindle as the reality of the COVID-19 pandemic began to set in. Unable to secure the necessary funds, the future of Southern Rep remains in question. By June 2020 Southern Rep had furloughed 60% of their staff and had postponed the season indefinitely, only retaining four members of staff secured through proceeds from the Paycheck Protection Program loan provided through the CARES Act.

Southern Rep Theatre Programming
Historical Programming

Southern Rep’s previous seasons consisted of six-shows, presented August through June, each with a socially conscious focus. Grandoit expanded on the importance of their culturally relevant offerings stating,
We are always looking for shows that ask our audiences to think further on complicated, or possibly challenging, topics. We hope that our shows are just the start of the conversation, and that [audiences] can take these ideas to those in their community for further discussion. (Grandoit, 2020)

As a member of the National New Play Network, there was a significant emphasis on new plays, with Southern Rep Theatre offering one regional or world premier each season, in addition to their playwrighting workshops for local artists.

Their space, located in the Treme/Seventh Ward neighborhoods of New Orleans contains a small cabaret stage, full bar, and black box theatre which seats between 90 to 125 patrons, dependent on configuration. During a mainstage season, Southern Rep would host patrons at 65% to 85% capacity.

Throughout their history, Southern Rep has been engaged with socially conscious and progressive works. This short selection of plays represents their history as a theatre company willing to take on complicated and timely topics:

**Fun Home** (2017) – Fun Home traces the coming-of-age of lesbian author Alison Bechdel, from her youth, to her years at Oberlin College, and finally to the present, where Alison, now grown, is struggling to write her own graphic autobiography. As Alison reflects on her past, she struggles to make sense of it, particularly her relationship with her father, Bruce, a closeted gay man and the owner of the family business -- the Bechdel Funeral Home. As she watches her father’s self-loathing consume him, Alison recognizes her own experience of discovering, and ultimately embracing, her identity. (Stage Agent, n.d.)
Song of a Man Coming Through (2015) – Earnest Knighton Jr. killed a man during a robbery in the early 1980s and was sentenced to death. While on death row at the Louisiana State Penitentiary at Angola, a team of lawyers appealed his sentence, arguing that if he wasn’t black, he wouldn’t have received the death penalty. (Gillespie, 2015)

Doubt, A Parable (2007) – Sister Aloysius, a Bronx school principal, takes matters into her own hands when she suspects the young Father Flynn of improper relations with one of the male students. (Dramatists Play Service, n.d.)

A Lesson Before Dying (2001) – Romulus Linney’s theatrical adaptation of Ernest J. Gaines’ Pulitzer Prize-nominated novel of the same title. This is the story of a young black man named Jefferson who is condemned to die for a crime he did not commit, and a teacher who helps him to die with dignity and self-respect (Appalachian State University, n.d.)

COVID-19 Programming

As a result of COVID-19 restrictions, along with the previous financial struggles, Southern Rep Theatre ceased all programming in the beginning months of the pandemic. Throughout the summer and into the fall, Southern Rep took advantage of their hiatus to dedicate the remaining manpower to creating a financial plan for going forward, and to seek out additional funding opportunities to sustain operations. Beginning in November 2020, Southern Rep Theatre returned to audiences with new programming, realigning focus to their original mission to encourage local and new works with the “Pop Up”, a monthly hour-long presentation of 10-minute plays written by local playwrights, pertaining to a specific theme chosen by the Southern Rep team, and presented to audiences via Zoom. Attendance at these performances has increased each month; however, the organization, which once hosted up to 100 patrons each
evening on a multi-week show run, are currently only drawing an audiences of 30-50 patrons once per month. Although the success of this program is limited when compared to previous seasons, Grandoit was optimistic about this programming, stating,

Even though our offerings with [the “Pop Up”] are less frequent, we have seen much more success than we predicted. We were prepared to entertain just the friends and families of the new playwrights, but instead we’ve gained a consistent following of folks who join us every month. I’m hopeful that these are the patrons who will be eager to join us once we’re back in-person. (Grandoit, 2020)

In addition to the virtual “Pop Up” offerings, Southern Rep Theatre was asked to participate as a host theatre for The Breath Project (TBP), an organization created in response to the Black Lives Matter movement during summer 2020. This project invited artists to write, perform, and film their response to the murder of George Floyd, which was then presented to audiences, and archived online. An excerpt from The Breath Project’s website details this project’s mission in three specific parts:

**Art:** In partnership with organizations and artists across the nation, TBP will create, develop and support original theatrical works, created by BIPOC artists. The work that is housed by TBP will be used as a tool for education and advocacy, as a living time capsule of this moment in history.

**Action:** TBP is working to build relationships between local artists and theaters in their community and region, creating more opportunities for BIPOC theater artists, technicians and administrators throughout the country. Working across our national partnerships, we will seek to end the notion that plays by BIPOC
artists fulfill a quota or check a box for a theater, and instead become an organic and permanent part of the American Theater landscape.

**Advocacy:** TBP will work to support the organizations that produce, fund and support the American Theater to eliminate the racism and biases that exist in our institutions and business practices. (The Breath Project, 2020)

Southern Rep Theatre acted as a participating theatre, taking on the role of producer, which entailed opening their space, writing and performance assistance, and providing marketing resources to aid artists on their submissions throughout the Southeast United States. Every submitted performance has been included in an online archive which preserves this important project, and selected performances were shown in a three-part online festival in October 2020 (The Breath Project, 2020).

**Presenting Work which Reflects the Current Social Climate**

Amid the summer’s Black Lives Matter movement and protests, Southern Rep Theatre was not producing any programming, but immediately following the murder of George Floyd, The Breath Project proposed the use of the Southern Rep Theatre as a hub for Southeastern artists to create in support of BLM. These efforts became the main focus of Southern Rep Theatre’s programming throughout the summer, pulling resources for writing assistance, production and filming tools and space, and marketing connections to further spread awareness about the project in New Orleans.

As a result of COVID-19, along with the Black Lives Matter movement, provided Southern Rep the opportunity to reassess future programming, and revisit the organization’s original mission. Grandoit stated that the organization’s mission has been in a state of transition for some time, and the current cultural environment has clarified their focus and purpose:
Over the summer months we partnered with some very socially focused organizations, like The Breath Project and the Democratic Socialists of America, to remain connected [to the community]. This has given us some idea of the kinds of offerings and support we want to continue. I think our mission will pivot toward creating plays with more community involvement, rather than just what we think they should see. (Grandoit, 2020)
Actor’s Express, located in Atlanta, Georgia, is a mid-sized theatre which hosts a main stage season, new play development, arts education classes, and other special events. The organization’s mission, according to their website,

Actor's Express is a theatre that challenges and reflects contemporary human experiences in an inclusive environment. We seek to jumpstart individual transformations through the shared adventure of our live performances, which range from daringly provocative to audaciously hilarious. Actor's Express constantly develops new talent, pushes boundaries and encourages people to question their place in the world. Our work creates emotional connections between audience and artist, catalyzing discussion on the complex issues of the contemporary human experience. We stay one step ahead of the conversation - our audiences expect to be challenged when they attend our programming. We firmly believe the relevance and vitality of the American theatre depends upon a continual infusion of new work and the nurturing of new playwrights. Playwrights are the chroniclers, critics and prophets of our times. They offer stories about the way we live, love, and sacrifice, and provide new insights into our shared humanity. Actor's Express is committed to championing the emerging voices of the American stage. Our primary goals are four-fold: to nurture the next generation of playwrights through workshops, readings, and full productions of new plays; to develop and nurture Atlanta's artistic community through rigorous theatre training; to catalyze the dialogue essential to the vitality of our neighborhood and our city; and to enhance Atlanta's reputation nationally as a thriving center for live performance. (Actor's Express, 2020)

This mission has guided Actor’s Express for decades and is a major component for their
inclusion in this study. The emphasis on reflecting their community and pushing boundaries makes Actor’s Express the perfect candidate for studying how these types of organizations are addressing the major cultural shifts currently in action.

Actor’s Express was started in 1988 by Chris Coleman and Harold M. Leaver. A theatre whose beginnings were in a church basement has grown beyond an additional location in Inman Park, and settled into the West Midtown’s King Plow Arts Center. They have cycled through a number of Artistic Directors since Coleman left in 2000 and have been led by Freddie Ashley since 2007. Actor’s Express’ success often lands them on “best-of” lists, with the Creative Loafing’s Best Local Theatre Company of 2011 being one of the most notable (Actor's Express, 2020)

**Actor’s Express Finances**

**TABLE 6: Actor’s Express Earned and Donated Revenue**

<table>
<thead>
<tr>
<th>Year</th>
<th>Contributions &amp; Grants</th>
<th>Program Service Revenue</th>
<th>Total Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>$494,421</td>
<td>$467,600</td>
<td>$961,921</td>
</tr>
<tr>
<td>2018</td>
<td>$682,870</td>
<td>$464,136</td>
<td>$1,147,006</td>
</tr>
</tbody>
</table>

(Department of the Treasury Internal Revenue Service, 2017) (Department of the Treasury Internal Revenue Service, 2018)

**TABLE 7: Actor’s Express Expenses**

<table>
<thead>
<tr>
<th>Year</th>
<th>Salaries &amp; Other Compensations</th>
<th>Fundraising Expenses</th>
<th>Other Expenses</th>
<th>Total Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>$534,984</td>
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<tr>
<td>2018</td>
<td>$457,741</td>
<td>$52,634</td>
<td>$546,033</td>
<td>$1,003,774</td>
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</tbody>
</table>

(Department of the Treasury Internal Revenue Service, 2017) (Department of the Treasury Internal Revenue Service, 2018)

*Requests for updated financial information, to include 2020 and projections for 2021 were made. At the time of submission, no additional information was provided.

**Financial Analysis**

Actor’s Express’ typical yearly budget, prior to the COVID-19 pandemic, fluctuated between $1.1 and $1.2 million. According to their 2018 990 Tax Forms, Actor’s Express retains
a modest $69,761 in assets, putting them in a better financial position that Southern Rep, but not completely secure. Due to the dramatic changes in operations, the organization has been forced to cut their budget by 80% for the 2020-2021 fiscal year. The loss of all of Actor’s Express’ earned revenue has had the greatest effect on their finances, as they now rely completely on contributed income.

Freddie Ashley, Actor’s Express’ Artistic Director, said that in a typical year their revenue is split evenly between earned and contributed income, with contributed funds consisting primarily of individual donations and government grants, similar to Southern Rep. These funding streams have greatly decreased during the pandemic, leaving Actor’s Express to rely on a Paycheck Protection Program Loan, issued through the CARES Act, and donations garnered through fundraising. The support provided through the CARES Act gave Actor’s Express the funding needed to continue operations following the mandated shutdowns. Similar to Southern Rep, these funds were used primarily to pay staff and maintain operations throughout the early months of the pandemic. At the time of the initial interview, Actor Express had retained their full staffing without any layoffs. The decrease in budget and funds has led to significant cuts, made almost entirely to their program offerings. Ashley states that the organization has elected to move to shorter, isolated pieces of programming rather than long-term program plans. All staff has been retained.

According to Fidelity Charitable, a charity and donor-advised fund, 79% of their donors plan to maintain or increase their charitable giving throughout the COVID-19 pandemic. However, 80% of these donors report being most concerned with health and human services organizations when determining where to make their donations. This competition for charitable
giving may further impact future donations to nonprofit theaters like Actors’ Express and Southern Rep Theatre (Fidelity Charitable).

**Actor’s Express Programming**

**Historical Programming**

Actor’s Express typically ran as a six-show mainstage season, with two to four new play workshops and readings. This was in addition to their educational offerings and long-running cabaret series hosted by a local singer. This robust season was hosted in their black box theatre which seats 145 to 165 patrons. Prior to the COVID-19 pandemic attendance for the organization’s mainstage programming averaged between 80% to 90%.

The bulk of mainstage programming was contemporary work, focusing on new plays and regional and national premiers, averaging one premier per season. Occasionally Actor’s Express would produce a new spin on a classic play, and a musical in the summer months.

Actor’s Express has a clear focus on social justice topics and culturally relevant themes. Below is a selection of past works presented by the organization, further detailing the focus Actor’s Express brings:

**The Brother’s Size** (2019) – In the sweltering heat of the Louisiana Bayou, Ogun Size tenuously reunites with his brother Oshoosi, who has recently been released from prison. When Oshoosi’s charismatic former cellmate Elegba arrives, the two brothers find themselves on a collision course with fate in this unflinching and tender exploration of the complex bonds of brotherhood. From the Academy Award-winning writer of Moonlight, The Brothers Size weaves together poetry, music and mythology to magnify the struggle for freedom and the need to belong somewhere (Actor's Express, 2020).

**Some Men** (2008) – A sweeping comedy-drama that spans nearly a century of gay life in America. This landmark play celebrates all the complexities of the American gay
experience. From laughter to tears and from struggle to triumph, Some Men is McNally’s most important and vital work since Love! Valour! Compassion! (Actor's Express, 2020)

**I Am My Own Wife** – I Am My Own Wife spins the spellbinding tale of Charlotte von Mahlsdorf, a German transvestite who survived the horrors and upheavals of mid-20th century Europe through a combination of cunning intelligence, primal instinct and amazingly good fortune. Her matter-of-fact retelling of this remarkable, yet at times questionable, tale is the key to the fascination she inspires in both the author and the audience. Although it is non-fiction, the story is spun like an action-adventure drama, with a cross-dressing furniture buff as the hero. (Actor's Express, 2020)

**COVID-19 Programming**

As the pandemic began in March of 2020, Actor’s Express was in the middle of their 2019-2020 season as the local government originally initiated an eight-week shutdown. When speaking with Ashley he was initially cautiously optimistic, stating, “I remember we had a conversation, ‘Well, they say we're shutting down for eight weeks, but let's count on ten, just to be on the safe side.’ How naive were we?” This wishful thinking continued throughout the summer and fall, as Actor’s Express planned short, almost-quarterly programming cycles to remain operational without spending resources on a full season which may be cancelled.

According to Ashley,

We thought we were going to be ahead of the curve by thinking about the future. It's just not turned out that way… when I saw that theatres were canceling for a whole year, I didn't want to lock us into that if we are able to come back safely sooner. So, I thought let's sort of put ourselves into these shorter planning cycles and we'll do digital and
virtual programming until then. And so, we've experimented with all kinds of [programming]. (Ashley, 2020)

During these cycles of short-term programming the organization began hosting Zoom readings and commissioned three local writers to create monologues which were filmed and hosted online. Along with these smaller programs, Actor’s Express’ largest experiment was to produce and film a full-length version of *Neat* by Charlayne Woodard. Initially this production was to be created and filmed within the organization’s theatre space but was changed to the actor’s home, with the actor working as her own camera operator, to accommodate safety restrictions imposed by the Actor’s Equity Association.

The next experiment for Actor’s Express was to commission a seven-episode podcast from six local playwrights. Each writer is responsible for one episode and none of the playwrights know what any of the content is until the writer before them finishes their episode.

Each of these programming offerings have realized only limited audience response. While free programming, like the Zoom readings, has brought in audiences much larger than those they have seen at in-person productions, larger, paid offerings have struggled to find their audience. According to Ashley,

[A live, in-person reading] will average anywhere from 30 to 60 people, depending on the reading. And then for the Zoom readings, we haven't had anything under 130 people. The flip side to that is when we did the film version of *Neat*, which was a ticketed event… [it] had very, very, very low viewership, like dramatically lower than what we ever have live. Numbers like three and four people a day watching it as opposed to a 150 a day. It really revealed to us that people just aren't willing to pay for virtual programming. We've
heard a lot of feedback from patrons that they liked the Zoom readings because of accessibility. (Ashley, 2020)

Ashley also made a point to mention that one upside virtual programming offers Actor’s Express is the ability to work with and present to artists and audiences nationally, rather than only people located in Atlanta.

**Presenting Work which Reflects the Current Social Climate**

When asked how the summer’s BLM protests affected Actor’s Express, Ashley stated the theatre’s responses were both internal and external. According to Ashley, everything that has been presented since June 2020, minus one of the staged readings, was BIPOC led and centered. Ashley anticipates this trend will continue for seasons to come.

Along with programming changes, Actor’s Express has begun reassessing administrative policies and numbers, spending three months of this time to write an “Anti-Racism and Anti-Bias Action Plan” and setting measurable goals for progress. Some of these goals include growing and maintaining a 50% BIPOC-led central programming goal, a 10% to 20% increase from previous years. In Ashley’s words,

We wanted to look at the internal culture of the organization to make sure that if we're going to achieve the kind of diversity, inclusion, and representation, we want [on stage], the internal culture of the organization has to be able to support that. So, it has to be a culture that's one in which people of color are empowered to be making decisions.

(Ashley, 2020)

Actor’s Express believes it is a priority for the theatre to be inclusive. To this effort, Ashley has begun a push to purposefully seek out artists and technicians from diverse
backgrounds, ranging from casting directors to set designers, and to reach out to people within the community with whom the theatre had not previously had a relationship.

In pursuit to remain genuine in this cause, Actor’s Express is also participating with Create ATL, a group of four activist artists working to help organizations become more diverse, and more representative or inclusive, while also providing accountability tools. This collaboration has caused Actor’s Express to examine their demographics, both in audiences and employees.

Finally, Ashley spoke about how the summer’s Black Lives Matter movement, along with the COVID-19 pandemic, have emphasized the importance of remaining true to their mission.

I think those two things [COVID-19 and BLM] have really been clarifying for us, and I hope that moving forward, that's what we'll carry with us. There are certainly plenty of things about the last few months that we're very eager to leave behind, but I'm hoping that what we carry forward are the lessons about how we're doing, what we are doing, and who are we doing it for. (Ashley, 2020)
INTERACT THEATRE COMPANY OVERVIEW
Mission and History

InterAct Theatre Company is located in Philadelphia, Pennsylvania. Much more succinct than the previous organizations, InterAct’s mission is stated as, “InterAct is a theatre for today's world, dedicated to commissioning, developing, and producing new and contemporary plays that explore the social, political, and cultural issues of our time, and to improving the regional climate for new plays” (InterAct Theatre Company, 2020).

Like Actor’s Express, InterAct was started in 1988 by current Artistic Director Seth Rozin with a vision to create plays which portray essential American values to foreign countries, and to bring foreign theatres to Philadelphia. This international exchange of ideas and cultures was the original mission which pushed the organization forward for the first few years. In the following seasons, InterAct shifted away from showcasing foreign productions to social, political, and cultural themes closer to home. This early change in focus has remained steady in the organization today, creating the structure for InterAct’s current vision of using theatre as a tool to promote civic discourse, which is further emphasized in their current mission statement as referred to earlier (InterAct Theatre Company, 2020).

Throughout its history, Rozin has remained the beating heart of InterAct, keeping the entire organization afloat during years when other founders had moved on. But this doesn’t mean that InterAct was a small operation; between 1989 and 1992 InterAct employed 75 artists, nearly 30% of whom were African American (InterAct Theatre Company, 2020). In 1993 they produced a production of 6221, a play which explored the MOVE tragedy in Philadelphia, a bombing coordinated by city officials against the black liberation group (Norward, 2019). This production’s premier occurred during the siege of the Branch Davidians in Waco, Texas, another perceived violent overreach of the government. The two events’ striking resemblance
immediately made the conversation InterAct was engaging in relevant to the broader society. The organization considers this the moment which solidified the company’s mission. InterAct and Rozin have carved out their place in Philadelphia as a place to start a community dialogue (InterAct Theatre Company, 2020).

Through their programming of a mainstage season, new play program, and special events, InterAct remains true to their values, outlined as artistic risk, civic engagement, and diversity (InterAct Theatre Company, 2020).

InterAct lists a robust mainstage season, a passion for new play development, and a focus on community engagement.

**InterAct Theatre Company Finances**

**TABLE 8: InterAct Theatre Company’s Earned and Donated Revenue**

<table>
<thead>
<tr>
<th>Year</th>
<th>Contributions &amp; Grants</th>
<th>Program Service Revenue</th>
<th>Investment Income</th>
<th>Other Revenue</th>
<th>Total Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>$764,661</td>
<td>$159,025</td>
<td>$97</td>
<td>$107,599</td>
<td>$1,031,382</td>
</tr>
<tr>
<td>2018</td>
<td>$514,228</td>
<td>$262,475</td>
<td>- $8,906</td>
<td>$6,049</td>
<td>$773,846</td>
</tr>
<tr>
<td>2019</td>
<td>$750,682</td>
<td>$288,757</td>
<td>- $2,180</td>
<td>$0</td>
<td>$1,037,259</td>
</tr>
</tbody>
</table>

(Department of the Treasury Internal Revenue Service, 2017) (Department of the Treasury Internal Revenue Service, 2018) (Department of the Treasury Internal Revenue Service, 2019)

**TABLE 9: InterAct Theatre Company’s Expenses**

<table>
<thead>
<tr>
<th>Year</th>
<th>Salaries &amp; Other Compensations</th>
<th>Fundraising Expenses</th>
<th>Other Expenses</th>
<th>Total Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>$361,224</td>
<td>$60,218</td>
<td>$690,414</td>
<td>$1,051,638</td>
</tr>
<tr>
<td>2018</td>
<td>$353,766</td>
<td>$34,334</td>
<td>$710,444</td>
<td>$1,064,210</td>
</tr>
<tr>
<td>2019</td>
<td>$388,988</td>
<td>$31,360</td>
<td>$637,558</td>
<td>$1,026,546</td>
</tr>
</tbody>
</table>

(Department of the Treasury Internal Revenue Service, 2017) (Department of the Treasury Internal Revenue Service, 2018) (Department of the Treasury Internal Revenue Service, 2019)

*Requests for updated financial information, to include 2020 and projections for 2021 were made. At the time of submission, no additional information was provided.

**Financial Analysis**

Prior to the COVID-19 pandemic, InterAct’s budget hovered around $865,000 which has decreased dramatically to between $560,000 to $600,000 for the 2020-21 fiscal year. Unlike the
other theatres examined in this study, this decreased budget does not indicate an overall loss in revenue; but surprisingly, InterAct predicts a $40,000 to $50,000 surplus. Additionally, according to InterAct’s 2019 990 Tax Forms, they maintain $2,123,789 in assets, placing them heads and shoulders above both Southern Rep’s and Actor’s Express’ financial standings.

As part of their adaption to the city and state mandated shutdowns, InterAct cancelled all shows planned for their season, which saved them significant funds on production costs, although they did pay out funds to contracted artists who were booked for the remaining season’s shows. Additionally, Artistic Director Seth Rozin stated that many of their patrons who had purchased tickets for the scheduled season elected to donate their portion of ticket sales back to the organization in the name of InterAct’s mission. This allowed InterAct to offer virtual programming to patrons at no cost at the beginning of the pandemic.

InterAct typically loses money on any given production and relies on contributed income to generate a significant portion of their revenue, and to cover this gap. The cancellation of more than half of their scheduled season saved the organization between $250,000 to $270,000. These surplus funds provided the opportunity for InterAct to plan for the future, adding almost $200,000 of expenses to next year’s budget to cover new programs and staff, the coordination of which was the primary focus in the months following the shutdowns.

Sourcing for contributed income has varied with InterAct receiving the United States government provided Paycheck Protection Program Loan through the CARES Act, as well as funds from other forms of fundraising. This loan provided InterAct with $60,000 in funds to cover payroll immediately following the shutdowns, all of which they hope to be forgiven as the pandemic progresses. Rozin stated that the relief support from the government, along with national and local foundations, has been instrumental in continuing operation and retaining staff.
As discussed in previous sections, InterAct is also primarily reliant on contributed income, Rozin stated that there were no major changes made to their fundraising strategies.

I would say we've done less reaching out to people, both major donors and smaller donors, and we've done pretty much as well [as in previous years]... And we've been told by several of our major donors that they appreciate the fact that we're not haranguing them all the time about stuff. (Rozin, 2020)

According to Rozin, this favorable financial position is attributed to their original business model which has always focused more heavily on contributed income over ticket sales, a unique feature; and one that differs from both Actor’s Express or Southern Rep Theatre.

InterAct’s business model has resulted in very little change for the organization’s financial structure. There have been no staff cuts beyond a part-time staff member lost to attrition, and they have even managed to pay out artists and performers who had previously been booked for the now cancelled season. Overall, InterAct has fared very well in the face of the COVID-19 pandemic and resulting shutdown.

**InterAct Theatre Company Programming**

**Historical Programming**

In seasons prior to March 2020, InterAct offered a four-play season between the months of October to June. Programming consisted of contemporary plays, focusing on the social, political, and cultural issues of our time.

Similar to the other theatres in this study, InterAct put much of their efforts toward producing new plays. As a member of the National New Play Network, the organization presents a combination of regional and national premiers, steering clear of popular holiday, family, or classic shows for their 33 years of existence.
In recent years, the organization has purchased an out-of-use apartment building, The Drake, transforming the former ballroom into two theatre stages. One of these spaces is the location of every production InterAct produces, containing a proscenium theatre which seats 121 patrons. Each production runs a minimum of 22 shows, calculating out to 2,800 total seats available per show. According to Rozin, InterAct averages 70% attendance at each show, fluctuating between 55% and 85%.

InterAct is the single theatre within this study which boasts the greatest emphasis on politically and culturally relevant works throughout their history. Below is a selection of pieces produced by the company to provide further context:

**Salt Pepper Ketchup** (2018) – A layer of bulletproof glass won’t protect Superstar Chinese Take-Out owners from the gentrification consuming the Point Breeze neighborhood in South Philly. When a trendy food co-op opens nearby, the Wu’s and their customers initially see it as a hipster annoyance, but as tensions mount, they begin to recognize the intrusion as an act of war. Tinged with genuine humor and pathos, Wilder’s play examines the very human consequences of neighborhood redevelopment -- who benefits and who gets chewed up and spit out? (InterAct Theatre Company, 2020)

**The Dangerous House of Pretty Mbane** (2014) – In this beautiful and haunting play, South African soccer phenomenon Noxolo has found safety and freedom in England--but when her activist lover Pretty Mbane goes missing during the world Cup, Noxolo’s search brings her face to face with the demons of her past and her country’s blind eye towards violence against women (InterAct Theatre Company, 2020).

**Etched in Skin on a Sunlit Night** (2011) – Commissioned by InterAct in 2009, this intense and theatrical drama about lust, betrayal, and culture clash marks the arrival of
one of the most exciting new voices in American theatre. The compelling story follows Jules, an African-American painter who has fled the U.S. under mysterious circumstances and embraced a whole new life and family in Iceland. As Barack Obama’s meteoric presidential campaign makes Jules more homesick than ever, her husband presents their biracial daughter with a shocking present, and a hometown visitor shows up at Jules’s studio. This whirlwind of events brings the demons of Jules’s past crashing down on her new family and challenges her sense of racial and personal identity. (InterAct Theatre Company, 2020)

**Black Russian** (1996) – The remarkable story of a father and son, each seeking a new life in a land of opportunity. Black Russian is one of the first American plays to explore the fall of communism. It takes us on a dramatic journey through 20th Century history through a time when such cultural luminaries as Paul Robeson and Langston Hughes became enchanted with the communist vision of the future. Black Russian is a tale of two extraordinary individuals–fascinating history, full of humor and humanity. (InterAct Theatre Company, 2020)

**COVID-19 Programming**

As previously stated, InterAct elected to cancel the remainder of their 2019-2020 season due to the pandemic, and host their current shows virtually, free to patrons. Rozin stated that there are no plans to alter the types of productions they will produce for their mainstage season moving forward, only adjusting to remain in-line with government regulations pertaining to social distancing. In fact, when speaking with Rozin, he stated they plan to “double down” on their history of using their space, income, and resources to support the bigger effort to support the community at large.
As part of this endeavor, InterAct has introduced new programming, which was created and organized during the pandemic shutdown, in addition to their mainstage season. This new programming was introduced as an effort to rethink and reset the organization’s priorities, returning to their mission and values of artistic risk, civic engagement, and diversity (InterAct Theatre Company, 2020). The cornerstone of this new programming is to utilize the theatre’s space, which Rozin considers their biggest asset, to support smaller companies and individual artists in creating and sharing their art. The organization plans to showcase new plays and musicals and subsidize some of the theatre’s space and time for struggling organizations. Additionally, they plan to provide grants to artists for new play projects. This new program will focus on supporting BIPOC artists, with an emphasis on racial equity rather than an opportunity for revenue.

Rozin predicts that changes in programming and modes of presentation will not have much effect on their audiences’ and patrons’ willingness to engage. Although they anticipate some fluctuation due to technological challenges, they are maintaining a positive outlook, focusing on garnering new audiences outside of Philadelphia who may have previously faced the barrier of distance from the theatre. Virtual programming allows national audiences to engage and support the theatre’s mission.

**Presenting Work which Reflects the Current Social Climate**

When asked in the interview if the summer’s Black Lives Matter movement and the general climate of social unrest has had any effect on InterAct’s programming or operations, Rozin said that it did not create any major changes for the organization, but rather confirmed their commitment to their existing efforts.
The [murder of] George Floyd provoked social unrest, which led to ‘We See You, White American Theatre’ but for us it was a continuation of what we were already doing artistically, and then trying to hear, really hear, and think about what we could do beyond the art on those fronts (Rozin, 2020)

We See You, White American Theatre is a collective of BIPOC theatre-makers born out of the summer’s social unrest which aims to address the racism in American theatre.

Rozin stated that he believes that InterAct would have had these conversations before their organization’s counterparts, because of their history as a progressive institution, but the current Black Lives Matter movement was a catalyst which sped up this process. Although these social and political conversations may have been the starting point, it is not the end of the conversation for InterAct. In Rozin’s own words:

We feel like part of what InterAct believes is that we have a responsibility not to any individual or any specific group, but to the community at large. Our job is to be at the forefront of these kinds of things. We should not be lagging. So, our response was, rather than… just looking inward at how we can adjust our practices and how we can hire more people [of color] and have better boards in terms of representation… but for us, it's also about what can we do to lift others up in a way that has no direct benefit for us other than we think it's the right thing to do. (Rozin, 2020)
Interpretation of Findings

All three non-profit theater participants in this study have seen a significant decrease in revenue since 2019. The financial devastation caused by the COVID-19 shut-downs will have lasting impacts, and it is currently unknown how these conditions will be wholly realized by each organization. The loss of the 2020 theater season, as it was planned, caused each to change course, one postponing and cancelling the entire season (InterAct), another pivoting to a fully online experiment (Actor’s Express), and the third forced to downsize its organization to remain viable for the time being (Southern Rep Theater).

Without ticket sales and with a decrease in contributed earnings, all three theaters applied for and received Government support through the CARES Act, rounds 1 and 2. This funding has been used primarily to revamp programming into a virtual format and to maintain payroll and operating expenses. Distribution of additional funds through the American Rescue Plan are also expected and will be used to support future reopening plans and a hopeful return to live, in-person performances later this year. The unique financial position of InterAct Theater is worth noting, as the decision to cancel their season (saving them production, contract payroll, and promotion costs,) was further off-set by their patrons’ and season ticket holders’ decisions to forego reimbursement, donating these funds back to the theater. Overall, InterAct finds itself the most financially stable at this moment, attributing their historically strong patron and donor relationship as its core advantage.

Responding to the need to provide an alternative programming format, all three theaters found creative, innovated offerings, including Actor’s Express’ full-length performance of the stage production *Neat*, filmed entirely by the actor in her own home (Actor's Express, 2020), or Southern Rep’s low-cost Pop-Up performances occurring monthly (Southern Rep Theatre,
2020). While it is revealed these virtual program offerings did not generate much revenue, they served the more important function of maintaining, and in some cases, increasing their audience engagement.

All three participants responded to the call for support of the Black Lives Matter movement and dedicated a large portion of their new, virtual programming to addressing the need for recognition and reform. Most notable, Southern Rep’s sponsorship of The Breath Project provided an outlet for local artists and playwrights to produce 8:46 minute performances, the length of time George Floyd was held in a choke hold until his death, to express their communities’ collective pain through their performances. Each of these organizations expressed a recommitment to vision and mission as one that reflects their communities’ values and attempts to strengthen their standing as a cultural center within their respective cities. Examples include Southern Rep’s Pop Up series with local playwrights, Actor’s Express’ goal of 50% BIPOC-led programming for the coming seasons, and InterAct’s continuing efforts to provide an outlet to social commentary, and a new space for the local performance art community to utilize. All three are rededicating support for new play production.
CHAPTER 5

CONCLUSIONS

This multiple case study analyzes how three mid-size, non-profit theaters are addressing the combined challenges of a global pandemic, and a cultural reckoning as the Arts fight for their survival following this past year. Theatres have moved quickly to develop a response to the restrictions brought on by COVID-19, while at the same time vying to remain relevant to their communities as summer protests and Black Lives Matter made obvious the discrimination within the industry. Finding a path forward in the face of unrelenting financial deficits, demand for alternative programming, and the call for systemic change will likely mark this year as one of the most turbulent in Performing Arts history.

Implications and Recommendations

Findings from this research supports the existing data suggesting a correlation between a theatre organization’s success and the general economy; however, these are not the only factors influencing a theater’s achievement during global distress and growing social pressures. The degree of success realized by the study participants relied heavily on the organizations’ existing financial stability when the pandemic occurred, their reputation within their communities, and their historic relationship with patrons. Additionally, a genuine response to cultural events aided in the retention of patrons and gave each of the theatres a pathway back to creating programming and continued engagement with their audiences.

Southern Rep and Actor’s Express, while remaining in operation and marginally successful, are still struggling to retain footing in the uncertain landscape but are examples of how to respond and remain viable even without the strong, pre-pandemic financial standing enjoyed by InterAct. Their willingness to adjust to the demands of the moment, for example,
fully embracing a virtual format when audiences are restricted from participating in person, allowed Southern Rep and Actor’s Express to remain in view of their donors and patrons. Arts organizations must develop a nimble philosophy that allows them to adapt quickly to new and changing circumstances. The COVID-19 pandemic, and resulting shutdowns, demonstrate how vulnerable all communal events are to the risk of closure from public health calamities, and, therefore, creating strategies to work proactively to address these types of potential challenges are essential. Seeing first-hand the devastation caused by the events of the past year, my first recommendation would be for all performing arts organization to establish crisis management plans which include ways to address pandemics, unexpected financial upheaval, and conceivable historic events that could shut down theatre operations. While it is impossible to plan for every plausible crisis, having a thoughtful strategy allows an organization to develop a culture of flexibility, and a system for getting the right resources to the right place as quickly as possible. Ensuring an organization has the ability to adapt quickly can be the difference between remaining in operation or being forced to risk closure as they wait out the proverbial “storm”.

Throughout this study each of the organizations’ Artistic Directors repeatedly stated the return to their mission was foundational to their survival. It offered them the framework for reestablishing their purpose as an organization, and a way to remain an important resource for their communities. Thus, this study’s next recommendation is to incorporate a genuine response to cultural happenings into an organization’s overall vision and purpose, so as to provide the necessary structure to evaluate an appropriate response as these potential events occur. Although not all arts organizations were founded from a socially conscious perspective, their function as a space for public discourse, make them essential to their communities. This responsibility demands regular examination and consideration of what their neighbors and patrons find
important. Knowing how an organization can develop a genuine response is integral to establishing an organization as a community resource.

InterAct Theatre Company has seen the most success during this time, and it appears to be the result of their ability to count on the support from their traditional patrons. New programming and budgetary cuts have aided in their ability to remain operational during this time, but the biggest factor appears to be the positive standing they have fostered in the community through years of steady operation and giving audiences what they want.

InterAct’s example could lead to a recommendation for performing arts venues to take advantage of tools like surveys or comment boxes to begin to create the two-way relationship necessary, but this does not go far enough. Instead, I return to the frame of reference of a patron, someone who enjoys the art each of these institutions produces. Therefore, my final recommendation is to encourage these organization to lean into transparency as a way to build trust and demonstrate fidelity to mission. Make available any information that provides supporters the awareness of the struggles and successes the organization is navigating; and lets them see how their support actually effects each decision as it’s made. Southern Rep’s decision to create the $350,000 GoFundMe after projecting financial health during their relocation created disjointed communication with patrons that made future support requests untenable. Creating a foundation of honestly and transparency can mitigate awkward donor interactions and encourage patrons to take an active role in supporting the organization.

Summary

A nonprofit theater’s survival and success following epic pressures is crisis management strategies, a genuine response to cultural events, and transparent communication with patrons and donors. It is important to continually examine organizational practices, and to allow for
continuing change in response to economic and cultural factors using this framework. The arts will continue to play a vital role within their communities and, therefore, warrant their place as mirrors for the reflection of our humanity.
REFERENCES


*QuickFacts, Atlanta city, Georgia.* (2019, July 1). Retrieved from United States Census Bureau: https://www.census.gov/quickfacts/atlantacitygeorgia


APPENDIX A
Actor’s Express 2017-2018 990 Forms
Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be make public

Information about Form 990 and its instructions is at www.irs.gov/form990

For the 2016 calendar year, or tax year beginning JUL 1, 2016 and ending JUN 30, 2017

B Name of organization

The Actor's Express, Inc.

D Employer Identification number

C Name of organization

Doing business as

J-107

E Telephone number

F Name and address of principal office: Alexander Scallon

same as C above

G Gross receipts

H(a) Is this a group return for subordinates?

Yes X No

461,921.

H(b) Are all subordinates included?

Yes X No

I Tax-exempt status

J Website: www.actors-express.com

K Form of organization

Part I - Summary

1. Briefly describe the organization's mission or most significant activities: Provide for promotion of the arts, theater and music and to effectuate training, education and

2. Check this box □ if the organization discontinued its operations or disposed of more than 50% of its net assets.

3. Number of voting members of the governing body (Part VI, line 1a)

4. Number of independent voting members of the governing body (Part VI, line 1b)

5. Total number of individuals employed in calendar year 2016 (Part VI, line 2a)

6. Total number of volunteers (estimate if necessary)

7. Total unrelated business revenue from Part VIII, column (b), line 12

8. Net unrelated business taxable income from Form 990-T, line 17

Activities & Governance

8. Contributions and grants (Part VIII, line 1)

9. Program service revenue (Part VIII, line 2g)

10. Investment income (Part VIII, column (A), lines 3, 4, and 7d)

11. Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11c)

12. Total revenue - add lines 8 through 11 (must equal Part VIII, column (b), line 1b)

13. Grants and similar amounts paid (Part IX, column (A), lines 1-3)

14. Benefits paid to or for members (Part IX, column (A), line 4)

15. Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)

16. Professional fundraising expenses (Part IX, column (A), line 11)

17. Other expenses (Part IX, column (A), lines 11a-11d, 11f-23e)

18. Total expenses - add lines 13 through 17 (must equal Part IX, column (A), line 25)

19. Revenue less expenses. Subtract line 18 from line 12

Prior Year

467,500.

Current Year

467,500.

20. Total assets (Part X, line 16)

21. Total liabilities (Part X, line 26)

22. Net assets or fund balances. Subtract line 21 from line 20

Received

MAY 21 2018

GDEN, UT

2017

270,835

2017

169,051

2017

101,784

Part II - Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. The person of preparer (other than officer) is based on all information of which preparer has any knowledge.

Signature of officer

Alexander Scallon, Managing Director

Type or print name and title

Cynthia Tabb

Paid Preparer

Preparer's signature

04/10/18

Use Only

Form 990

See Schedule O for Organization Mission Statement Continuation

30
<table>
<thead>
<tr>
<th>Part</th>
<th>Signature Block</th>
<th>Net Assets of 2017</th>
<th>Total Assets (Part IX, line 10d)</th>
</tr>
</thead>
<tbody>
<tr>
<td>22</td>
<td>Alexander Scollon, Managing Director</td>
<td>$65,000</td>
<td>$52,614.11</td>
</tr>
</tbody>
</table>

**Revenue**

- **Part IX**
  - Total revenue: $52,614.11

**Expenses**

- **Part IX**
  - Total expenses: $47,300.91

**Activities & Governance**

- **Part IX**
  - Number of voting members of the governing body: 1
  - Total number of individuals employed in calendar year 2017: 10

---

**Additional Information**

- **Part IX**
  - Website: www.a.c.d-express.org
  - Membership: 100 members
  - Description of organization: Provides financial reports and educational services to the community.
### Balance Sheet

#### Part X

<table>
<thead>
<tr>
<th>Assets</th>
<th>(A) Beginning of year</th>
<th>(B) End of year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Cash - non-interest-bearing</td>
<td>21,251</td>
<td>8,750</td>
</tr>
<tr>
<td>2 Savings and temporary cash investments</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3 Pledges and grants receivable, net</td>
<td>5,199</td>
<td>78,199</td>
</tr>
<tr>
<td>4 Accounts receivable, net</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete Part II of Schedule L</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employee benefit plans</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete Part II of Schedule L</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Notes and loans receivable, net</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>8 Inventories for sale or use</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>9 Prepaid expenses and deferred charges</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>10a Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D</td>
<td>10a</td>
<td>10a</td>
</tr>
<tr>
<td>b Less accumulated depreciation</td>
<td>453,369</td>
<td>143,646</td>
</tr>
<tr>
<td>11 Investments - publicly traded securities</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>12 Investments - other securities</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>13 Investments - program related</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>14 Intangible assets</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>15 Other assets</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>16 Total assets</td>
<td>210,932</td>
<td>214,876</td>
</tr>
</tbody>
</table>

#### Liabilities

<table>
<thead>
<tr>
<th>Liabilities</th>
<th>(A) Beginning of year</th>
<th>(B) End of year</th>
</tr>
</thead>
<tbody>
<tr>
<td>17 Accounts payable and accrued expenses</td>
<td>42,791</td>
<td>39,451</td>
</tr>
<tr>
<td>18 Notes payable</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>19 Deferred revenue</td>
<td>44,493</td>
<td>62,326</td>
</tr>
<tr>
<td>20 Tax-exempt bond liabilities</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>21 Escrow or custodial account liability</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>Complete Part IV of Schedule D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22 Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons</td>
<td>63,717</td>
<td>43,338</td>
</tr>
<tr>
<td>Complete Part II of Schedule L</td>
<td></td>
<td></td>
</tr>
<tr>
<td>23 Secured mortgages and notes payable to unrelated third parties</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>24 Unsecured notes and loans payable to unrelated third parties</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24)</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Complete Part X of Schedule D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>26 Total liabilities</td>
<td>151,001</td>
<td>145,115</td>
</tr>
</tbody>
</table>

#### Net Assets or Fund Balances

<table>
<thead>
<tr>
<th>Net Assets or Fund Balances</th>
<th>(A) Beginning of year</th>
<th>(B) End of year</th>
</tr>
</thead>
<tbody>
<tr>
<td>27 Unrestricted net assets</td>
<td>59,931</td>
<td>44,459</td>
</tr>
<tr>
<td>28 Temporarily restricted net assets</td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>29 Permanently restricted net assets</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>Organizations that do not follow SFAS 117 (ASC 958), check here □ and complete lines 30 through 33 and 34.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>30 Capital stock or trust principal, or current funds</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>31 Paid-in or capital surplus, or land, building, or equipment fund</td>
<td>31</td>
<td></td>
</tr>
<tr>
<td>32 Retained earnings, endowment, accumulated income, or other funds</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>33 Total net assets or fund balances</td>
<td>59,931</td>
<td>69,761</td>
</tr>
<tr>
<td>34 Total liabilities and net assets/fund balances</td>
<td>210,932</td>
<td>214,876</td>
</tr>
</tbody>
</table>
APPENDIX B
InterAct 2017-2019 990 Forms
Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

A For the 2016 calendar year, or tax year beginning 01-01-2016, and ending 06-30-2017

B Checklist applicable

☐ Amended return

☐ Name change

☐ Date return final

☐ Form/return filed

☐ Remittance received

☐ Applications pending

Name and address of principal officer

INTERNATIONAL

一世 Telephone number:

☐ Group comments & 1,031,382

☐ Yes No

Website:

WWW.INTERNATIONALTHREATRE.ORG

Form of organization:

☐ Corporation ☐ Trust ☐ Association ☐ Other

☐ Later

☐ Yes ☐ No

☐ Group exemption number

☐ Year of formation 1989 ☐ State of legal domicile NY

Part I Summary

1 Briefly describe the organization’s mission or most significant activities.

The ORGANIZATION IS A THEATER FOR TODAY’S WORLD, PRODUCING NEW AND CONTEMPORARY PLAYS THAT EXPLORE THE ISSUES OF OUR TIME. THE ORGANIZATION’S AIM IS TO EDUCATE, AS WELL AS ENTERTAIN, ITS AUDIENCE BY PRODUCING WORLD-CLASS, THOUGHT-PROVOKING PRODUCTIONS, AND OUR USES THEATER AS A TOOL

2 Check the box ☑ of the organization discontinued its operations or disposed of more than 15% of its net assets

☐ Number of voting members of the governing body (Part VI, line 1a) 3

☐ Number of independent voting members of the governing body (Part VI, line 1b) 15

☐ Total number of individuals employed in calendar year 2016 (Part V, line 2a) 5

☐ Total number of volunteers (estimate if necessary) 23

☐ Total unrelated business revenue from Part VIII, column (C), line 12 0

☐ Total unrelated business income from Form 990-T, line 34 0

☐ Contributions and grants (Part VIII, line 3b) 2,221,312 764,601

☐ Program service revenue (Part VIII, line 2g) 107,292 159,655

☐ Investment income (Part VIII, column (A), lines 3, 4, and 7a) 3

☐ Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9a, 10c, and 11a) 14

☐ Total revenue—add lines 8 through 11 (must equal Part VIII column (A), line 12) 2,359,285 1,031,782

☐ Grants and similar amounts paid (Part IX, column (A), lines 1-3) 0

☐ Benefits paid to or for members (Part IX, column (A), line 4) 0

☐ Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) 364,897 361,324

☐ Professional fundraising fees (Part IX, column (A), line 11a) 0

☐ Total fundraising expenses (Part IX, column (D), lines 25) 0

☐ Total expenses (Part IX, column (A), lines 31a-111c, 117-246) 0

☐ Total expenses (Part IX, column (A), lines 31a-111c, 117-246) 528,966 690,045

☐ Total expenses (Part IX, column (A), line 25) 287,863 1,051,638

☐ Revenue less expenses subtract line 15 from line 14 1,311,342 -12,203

☐ Total assets (Part X, line 16) 3,318,817 3,059,580

☐ Total liabilities (Part X, line 26) 856,458 641,857

☐ Net assets or fund balances subtract line 21 from line 20 2,462,359 2,417,723

Part II Signature Block

Undertakings of the preparer, I declare that: I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge

Signature of officer

Date

☐ Yes ☐ No

For Paperwork Reduction Act Notice, see the separate instructions.
**Form 990**

**Return of Organization Exempt From Income Tax**

Under section 501(c)(3), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

**2017**

Open to Public Inspection

---

**Part I - Summary**

1. Briefly describe the organization's mission or most significant activities.
   
   THE ORGANIZATION IS A THEATRE FOR TODAY'S WORLD, PRODUCING NEW AND CONTEMPORARY PLAYS THAT EXPLORE THE ISSUES OF OUR TIME. THE ORGANIZATION'S AIM IS TO EDUCATE, AS WELL AS ENTERTAIN, ITS AUDIENCE BY PRODUCING...

2. Check the box □ if the organization discontinued its operations or disposed of more than 25% of its net assets.

3. Number of voting members of the governing body (Part VI, line 1a).

4. Number of independent voting members of the governing body (Part VI, line 1b).

5. Total number of individuals employed in calendar year 2017 (Part VI, line 2a).

6. Total number of volunteers (estimate if necessary).

7a. Total unrelated business revenue from Part VIII, column (C), line 13.

7b. Net unrelated business taxable income from Form 990-T, line 34.

---

**Revenue**

- Contributions and grants (Part VIII, line 1h).
- Program service revenue (Part VIII, line 2g).
- Investment income (Part VIII, column (A), lines 3, 4, and 7b).
- Other revenue (Part VIII, column (A), lines 5, 6, 8, 9, 10, 10d, 11e).
- Total revenue (Part VIII, column (A), line 11).

**Expenses**

- Benefits paid to or for members (Part IX, column (A), line 4).
- Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10).
- Professional fundraising fees (Part IX, column (A), line 11).
- Total fundraising expenses (Part IX, column (D), line 13).
- Total expenses (Part IX, column (A), lines 11–14).
- Total liabilities (Part X, line 16).
- Total net assets or fund balances (Subtract line 18 from line 14).

---

**Part II - Signature Block**

I hereby declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

---

**Paid Preparer Use Only**

If you are paid to prepare this return, you must keep a copy of this form with your records.

---

**Note:**

69
Form 990

Return of Organization Exempt From Income Tax

Under section 501(c)(3), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be made public

Go to www.irs.gov/Form990 for instructions and the latest information.

2018

Open to Public Inspection

Part I

Summary

1. Briefly describe the organization's mission or most significant activities.

2. Check the box [ ] if the organization discontinued its operations or disposed of more than 5% of its net assets.

3. Number of voting members of the governing body (Part V, line 1a) ...........................................

4. Number of independent voting members of the governing body (Part V, line 1b) ...................................

5. Total number of individuals employed in calendar year 2018 (Part V, line 2a) .................................

6. Total number of volunteers (estimate if necessary) ...........................................................................

7a. Total unrelated business revenue from Part VIII, column (C), line 12 ...........................................

7b. Net unrelated business taxable income from Form 990-T, line 34 ..................................................

Revenue

8. Contributions and grants (Part VIII, line 1h) ..............................................................................

9. Program service revenue (Part VIII, line 2p) ..........................................

10. Investment income (Part VIII, column (A), lines 3, 4, and 7e) ....................................................

11. Other revenue (Part VIII, column (A), lines 5, 6, 8, 9, 10, and 11e) ............................................

12. Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12) ..................

Expenses

13. Grants and similar amounts paid (Part IX, column (A), lines 1-3) ..........................................

14. Benefits paid to or for members (Part IX, column (A), line 4) .....................................................

15. Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) ......................

16a. Professional fundraising fees (Part X, column (A), line 11e) .....................................................

16b. Total fundraising expenses (Part X, column (A), line 11e) ......................................................

17. Other expenses (Part X, column (A), lines 11-116, 11f-24e) .....................................................

18. Total expenses. Add lines 13-17 (must equal Part X, column (A), line 25) .................................

19. Revenue less expenses. Subtract line 18 from line 12 ..............................................................

Part II

Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Signature of officer: .........................................................

Date: 2020-01-29

Paid Preparer Use Only

Print/Type preparer's name: ...........................................

Preparer's signature: ....................................................

Date: 2020-01-22

Check [ ] self-employed

Paid Preparer Signature: ............................................

Form No. 112052V

For Paperwork Reduction Act Notice, see the separate instructions.
### Part X: Balance Sheet

Check if Schedule D contains a response or note to any line in this Part X: ____________

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>(\text{Beginning of year})</th>
<th>(\text{End of year})</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Cash—non-interest-bearing</td>
<td>112,921</td>
<td>182,405</td>
</tr>
<tr>
<td>2</td>
<td>Savings and temporary cash investments</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>Receivables</td>
<td>242,698</td>
<td>235,158</td>
</tr>
<tr>
<td>4</td>
<td>Accounts receivable, net</td>
<td>28,503</td>
<td>0</td>
</tr>
<tr>
<td>5</td>
<td>Loans and other receivables</td>
<td>(\text{See Part VII, line } 13)</td>
<td>(\text{Complete Part II of Schedule A})</td>
</tr>
<tr>
<td>6</td>
<td>Investments—other securities</td>
<td>(\text{See Part V, line } 15)</td>
<td>(\text{Complete Part IV of Schedule D})</td>
</tr>
<tr>
<td>7</td>
<td>Intangible assets</td>
<td>(\text{See Part IV, line } 12)</td>
<td>(\text{Complete Part IV of Schedule D})</td>
</tr>
<tr>
<td>8</td>
<td>Other assets</td>
<td>(\text{See Part IV, line } 11)</td>
<td>(\text{Complete Part IV of Schedule D})</td>
</tr>
<tr>
<td>9</td>
<td>Total assets</td>
<td>(\text{See Part IV, line } 10)</td>
<td>(\text{Complete Part IV of Schedule D})</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td>(\text{Complete Part IV of Schedule D})</td>
<td>(\text{Complete Part IV of Schedule D})</td>
</tr>
<tr>
<td>11</td>
<td>Accounts payable</td>
<td>18,060</td>
<td>18,451</td>
</tr>
<tr>
<td>12</td>
<td>Taxes payable</td>
<td>76,294</td>
<td>51,705</td>
</tr>
<tr>
<td>13</td>
<td>Bond liabilities</td>
<td>(\text{Complete Part IV of Schedule D})</td>
<td>(\text{Complete Part IV of Schedule D})</td>
</tr>
<tr>
<td>14</td>
<td>Loans and other payables</td>
<td>(\text{Complete Part IV of Schedule D})</td>
<td>(\text{Complete Part IV of Schedule D})</td>
</tr>
<tr>
<td>15</td>
<td>Secured mortgages</td>
<td>(\text{Complete Part IV of Schedule D})</td>
<td>(\text{Complete Part IV of Schedule D})</td>
</tr>
<tr>
<td>16</td>
<td>Total liabilities</td>
<td>(\text{Complete Part IV of Schedule D})</td>
<td>(\text{Complete Part IV of Schedule D})</td>
</tr>
<tr>
<td>17</td>
<td>Unrestricted net assets</td>
<td>(\text{Complete Part IV of Schedule D})</td>
<td>(\text{Complete Part IV of Schedule D})</td>
</tr>
<tr>
<td>18</td>
<td>Temporarily restricted net assets</td>
<td>(\text{Complete Part IV of Schedule D})</td>
<td>(\text{Complete Part IV of Schedule D})</td>
</tr>
<tr>
<td>19</td>
<td>Permanently restricted net assets</td>
<td>(\text{Complete Part IV of Schedule D})</td>
<td>(\text{Complete Part IV of Schedule D})</td>
</tr>
<tr>
<td>20</td>
<td>Total liabilities</td>
<td>(\text{Complete Part IV of Schedule D})</td>
<td>(\text{Complete Part IV of Schedule D})</td>
</tr>
<tr>
<td>21</td>
<td>Organizations that do not follow SFAS 117 (ASC 958), check here □ and complete lines 27 through 34, and lines 33 and 34.</td>
<td>(\text{Complete Part IV of Schedule D})</td>
<td>(\text{Complete Part IV of Schedule D})</td>
</tr>
<tr>
<td>22</td>
<td>Capital stock or trust principal, or current funds</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
APPENDIX C
Southern Rep 2017-2019 990 Forms
Return of Organization Exempt From Income Tax

Form 990

Department of the Treasury
Internal Revenue Service

For the 2016 calendar year, or tax year beginning 07-01-2016 and ending 06-30-2017

A. General Information

B. Check if applicable

C. Description of organization

SOUTHERN REPORATORY THEATRE

D. Employer identification number

E. Telephone number

F. Name and address of principal officer

ALAN HAYES

G. Are the organization’s activities described in its application for recognition as exempt under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)?

H. Are all subsidiaries included?

I. Gross receipts

J. Websites

WWW.SOUTHERNREP.COM

K. Form of organization

Corporation

L. Year of formation

1986

M. State of legal domicile

LA

Part I - Summary

1. Briefly describe the organization’s mission or most significant activities

TO DEVELOP AND PRODUCE NEW PLAYS, TO PROVIDE OUR AUDIENCE WITH A PROFESSIONAL THEATRE OF THE HIGHEST ARTISTIC QUALITY AND ACHIEVEMENT, AND TO ESTABLISH A CREATIVE WORKING ENVIRONMENT THAT NURTURES THE ART TRADITIONS OF THE SOUTHEAST.

2. Check this box if the organization discontinued its operations or disposed of more than 25% of its net assets

3. Number of voting members of the governing body (Part VI, line 1a)

4. Number of independent voting members of the governing body (Part VI, line 1b)

5. Total number of individuals employed in calendar year 2016 (Part V, line 2a)

6. Total number of volunteers (estimate if necessary)

7. Total unrelated business revenue from Part VIII, column (C), line 12

8. Net unrelated business taxable income from Form 990-T, line 34

Revenue

- Contributions and grants (Part VIII, line 1k)
- Program service revenue (Part VIII, line 2g)
- Investment income (Part VIII, column (A), lines 3, 4, and 7b)
- Other revenue (Part VIII, column (A), lines 5, 6a, 6b, 6c, 6d, and 11e)
- Total revenue (must equal Part VIII, column (A), line 12)

Expenditures

- Grants and similar amounts paid (Part IX, column (A), lines 1-3)
- Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)
- Professional fundraising expenses (Part IX, column (A), line 11e)
- Total fundraising expenses (Part IX, column (D), line 25)
- Other expenses (Part IX, column (A), lines 11-15, 19-20a)
- Total expenses (must equal Part IX, column (A), line 29)
- Revenue less expenses: Subtract line 18 from line 12

Net Assets or Fund Balances

- Total assets (Part X, line 16)
- Total liabilities (Part X, line 28)
- Net assets or fund balances: Subtract line 23 from line 20

Part II - Signature Block

I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Signature of officer

Date

Print/Type preparer's name

LINDSEY J CALSER CPA

Preparer's signature

LINDSEY J CALSER CPA

Data

Check if self-preparation

LEF

Paid Preparer Use Only

May the IRS discuss this return with the preparer shown above? (see instructions)

Yes ☐ No ☐

For Paperwork Reduction Act Notice, see the separate instructions.

Cat No 11282Y

Form 990 (2016)

73
Return of Organization Exempt From Income Tax

For the 2017 calendar year, or tax year beginning on July 1, 2017, and ending on June 30, 2018.

Part I - Summary

1. Briefly describe the organization’s mission or most significant activities.

2. Check the box if the organization discontinued its operations or disposed of more than 25% of its net assets.

3. Number of voting members of the governing body (Part VI, line 1a).

4. Number of independent voting members of the governing body (Part VI, line 1b).

5. Total number of individuals employed in calendar year 2017 (Part VI, line 2a).

6. Total number of volunteers (estimate if necessary).

7a. Total unrelated business revenue from Part VIII, column (C), line 13.

7b. Net unrelated business taxable income from Form 990-T, line 34.

Part II - Revenue

8. Contributions and grants (Part VIII, line 1).

9. Program service revenue (Part VIII, line 2).

10. Investment income (Part VIII, column (A), lines 3, 4, and 7).

11. Other revenue (Part VIII, column (A), lines 5, 6, 8, 9c, 10c, and 11).

12. Total revenue (Part VIII, column (A), lines 3-11).

Part III - Expenses

13. Benefits paid to or for members (Part IX, column (A), line 4).

15. Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10).

16a. Professional fundraising fees (Part IX, column (A), line 11a).

16b. Total fundraising expenses (Part IX, column (D), line 16).

17. Total expenses (Part IX, column (A), lines 11a-11c, 15, 20).

18. Total expenses (Part IX, column (A), line 20).


Part IV - Net Assets or Fund Balances

20. Total assets (Part X, line 16).

21. Total liabilities (Part X, line 26).

22. Net assets or fund balances. Subtract line 21 from line 20.

Part V - Signature Block

I, the person or officer to whom this form is directed, do hereby certify that the information contained in this return is true, correct, and complete.

Signature of Officer or Authorized Agent

Date

Sign Here

ADA RAVEN ARTISTIC DIRECTOR

Paid Preparer Use Only

Print or type preparer’s name

Preparer’s signature

Preparer’s EIN

Check if self-prepared

Signature of Preparer or Authorized Agent

Date

Phone

For Paperwork Reduction Act Notice, see the separate instructions.

Cat No: 11328

Form 990 (2017)

74
**Part I**

**Summary**

1. Briefly describe the organization’s mission or most significant activities:
   
   TO DEVELOP AND PRODUCE NEW PLAYS, TO PROVIDE OUR AUDIENCE WITH A PROFESSIONAL THEATRE OF THE HIGHEST ARTISTIC QUALITY AND ACHIEVEMENT, AND TO ESTABLISH A CREATIVE WORKING ENVIRONMENT THAT NOURISHES THEATRE PROFESSIONALS.

2. Check this box ☑ if the organization discontinued its operations or disposed of more than 25% of its net assets:

<table>
<thead>
<tr>
<th>Item</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>9</td>
</tr>
<tr>
<td>Net assets</td>
<td>0</td>
</tr>
</tbody>
</table>

**Activities and Accomplishments**

<table>
<thead>
<tr>
<th>Item</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions and grants (Part VIII, line 18)</td>
<td>399,456</td>
</tr>
<tr>
<td>Program service revenue (Part VIII, line 2g)</td>
<td>249,142</td>
</tr>
<tr>
<td>Investment income (Part VIII, column A, lines 3, 4, and 7b)</td>
<td>168</td>
</tr>
<tr>
<td>Other revenue (Part VIII, column A, lines 5, 6, 8b, 9c, and 11b)</td>
<td>95,150</td>
</tr>
<tr>
<td>Total revenue—add lines 8 through 11 (must equal Part VIII, column A, line 12)</td>
<td>743,924</td>
</tr>
</tbody>
</table>

**Expenditures**

<table>
<thead>
<tr>
<th>Item</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants and similar amounts paid (Part IX, column A, lines 1-3)</td>
<td>0</td>
</tr>
<tr>
<td>Benefits paid to or for members (Part IX, column A, line 4)</td>
<td>0</td>
</tr>
<tr>
<td>Salaries, other compensation, employee benefits (Part IX, column A, lines 5-10)</td>
<td>341,972</td>
</tr>
<tr>
<td>Professional fundraising fees (Part IX, column A, line 11b)</td>
<td>0</td>
</tr>
<tr>
<td>Other expenses (Part IX, column A, lines 11a-11d, 11f-24e)</td>
<td>415,190</td>
</tr>
<tr>
<td>Total expenses. Add lines 13-17 (must equal Part IX, column A, line 25)</td>
<td>757,168</td>
</tr>
<tr>
<td>Revenue less expenses. Subtract line 18 from line 12</td>
<td>-12,244</td>
</tr>
</tbody>
</table>

**Net Assets or Fund Balances**

<table>
<thead>
<tr>
<th>Item</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total assets (Part X, line 16)</td>
<td>335,932</td>
</tr>
<tr>
<td>Total liabilities (Part X, line 26)</td>
<td>110,455</td>
</tr>
<tr>
<td>Net assets or fund balances: Subtract line 21 from line 20</td>
<td>225,477</td>
</tr>
</tbody>
</table>

**Part II**

**Signature Block**

I, [Name], declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

**Sign Here**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Name]</td>
<td>[Title]</td>
</tr>
</tbody>
</table>

**Paid Preparer Use Only**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Name]</td>
<td>[Title]</td>
</tr>
</tbody>
</table>

**For Paperwork Reduction Act Notice, see the separate instructions.**

Cat. No. 11202T Form 990 (2018)
### Part X  Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X.

<table>
<thead>
<tr>
<th></th>
<th>(A) Beginning of year</th>
<th>(B) End of year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>10,163</td>
<td>1,007</td>
</tr>
<tr>
<td>2</td>
<td>7,724</td>
<td>46,498</td>
</tr>
<tr>
<td>3</td>
<td>170,373</td>
<td>130,083</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
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<tr>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>24,223</td>
<td>26,156</td>
</tr>
<tr>
<td>10</td>
<td></td>
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<tr>
<td>11</td>
<td></td>
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<tr>
<td>12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td></td>
<td></td>
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<tr>
<td>14</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total assets: Add lines 1 through 15 (must equal line 16)</td>
<td>335,932</td>
</tr>
</tbody>
</table>

### Liabilities

<table>
<thead>
<tr>
<th></th>
<th>(A)</th>
<th>(B)</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>17,101</td>
<td>57,490</td>
</tr>
<tr>
<td>18</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>54,690</td>
<td>27,958</td>
</tr>
<tr>
<td>20</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>58,624</td>
<td>478,457</td>
</tr>
<tr>
<td>24</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total liabilities: Add lines 17 through 25</td>
<td>110,415</td>
</tr>
</tbody>
</table>

### Net Assets of Fund Balances

<table>
<thead>
<tr>
<th></th>
<th>(A)</th>
<th>(B)</th>
</tr>
</thead>
<tbody>
<tr>
<td>27</td>
<td>225,517</td>
<td>-68,132</td>
</tr>
<tr>
<td>28</td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>31</td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>32</td>
<td></td>
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<tr>
<td>33</td>
<td>33</td>
<td></td>
</tr>
<tr>
<td>34</td>
<td>34</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total liabilities and net assets of fund balances</td>
<td>335,932</td>
</tr>
</tbody>
</table>
APPENDIX D
Thematic Analysis Coding & Themes
What role does a drastic decrease in revenue, both earned and contributed, play in the survival of small theatres during a national crisis?

<table>
<thead>
<tr>
<th>Codes</th>
<th>Theme</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decreased budget</td>
<td></td>
</tr>
<tr>
<td>Limited programming</td>
<td>Financial stress</td>
</tr>
<tr>
<td>PPP/CARES Act</td>
<td></td>
</tr>
<tr>
<td>Reliance on individual donors</td>
<td>Contributed income</td>
</tr>
</tbody>
</table>

What role does a theatre’s ability to adapt programming to new technology, platforms, and demand play in the survival of the organization?

<table>
<thead>
<tr>
<th>Codes</th>
<th>Theme</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduced attendance</td>
<td>Struggles</td>
</tr>
<tr>
<td>Low/no cost offerings do best</td>
<td></td>
</tr>
<tr>
<td>Ability to connect nationally</td>
<td></td>
</tr>
<tr>
<td>Low financial impact (overhead)</td>
<td>Wins</td>
</tr>
</tbody>
</table>

What role do political, social, and cultural pressures of the day play in determining an arts organization’s response to a fiscal crisis occurring in the same moment?

<table>
<thead>
<tr>
<th>Codes</th>
<th>Theme</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black Lives Matter Movement</td>
<td>Revisiting mission/purpose</td>
</tr>
<tr>
<td>BIPOC led</td>
<td></td>
</tr>
<tr>
<td>Organization restructuring</td>
<td></td>
</tr>
</tbody>
</table>
VITA

The author was born in Southern California, and obtained her Bachelor’s degree in theatre arts from California State University, Chico in 2016. She joined the University of New Orleans arts administration graduate program to pursue a MA in Arts Administration, and has become an active member in the local arts community, interning at Southern Rep Theatre.