



**INTERSTATE
FIREHOUSE
CULTURAL
CENTER**

September 1990

To: Melanie Beene & Associates
From: IFCC

Re: Advancement Grant Work Plan

IFCC page one of three

Sub copy

5340 N. Interstate Avenue
Portland, Oregon 97217
(503) 243-7930

<u>When</u>	<u>What</u>	<u>Who</u>
9-12&13	- Organizational Self-assessment - Work Plan Draft - Letter of Agreement	Executive Committee & Staff
9-18	Planning Session: Mission & Artistic Vision	Staff
9-21	Letter of Agreement Draft to IFCC	Consultant
9-24	- Contact Marketing Volunteer Consultant - Mail Lt. of Agreement & Plan to Ellen	Staff
9-26	Planning Session: Mission & Artistic Vision	Executive Committee & Staff
9-27	Planning Session: Mission & Artistic Vision	Community & Staff
9-28	Planning Session: Articulate issues of IFCC/City relationship	Governance Committee
9-30	Mail Ltr. of Agreement & Work Plan to M. Beene	Consultant
10-03	Draft #1: Mission Statement, Goals & Objectives	Staff
10-06	Draft #2: Mission Statement, Goals & Objectives	Staff & Consultant
10-13	Planning Session: FM match	Fundraising Committee
10-15	Review current By-laws & Articles, Board Job Descriptions, Board Committee Structure & Functions	Governance Committee & Staff

Showing Portland's diverse cultural communities through the arts.
Commissioner in Charge, Dick Bogle

10-18	Regular Board Meeting	Board & Staff
10-26&27	Board Retreat: - Review & Approve Mission Draft - Discuss governance, roles & responsibilities of Board & Staff	Board, Staff & Consultant
✓ 11-08	Draft FM match fundraising plan	Fundraising Committee
11-15	Regular Board Meeting - Review Fundraising Plan	Board & Staff
11-30	Conduct review & complete assessment of IFCC/City relationship	Governance Committee
12-01	Draft #1 Mission Statement, goals & objectives plus 3-yr. Programming Plan	Staff
12-07	Site visit: Review draft in progress	Consultant & Staff
12-08	Draft #2 Mission Statement	Staff
12-13	Regular Board Meeting	Board & Staff
12-14	NEA Progress Report #1 due	Staff
12-15	Submit to consultant Draft #2 of Mission Statement	Staff
1-2,7,14	Develop 3 yr. Financial Projections	Staff
1-10&11	Site visit: Analyze Effectiveness of marketing/PR & make recommendations	Laurie MacDougal, Consultant & Staff
1-17 1-25	Regular Board Meeting <i>Mail Drafts of 3 yr financial projections/ revised Narrative to allow</i>	Board & Staff
1-27	Draft goals, objectives and strategies relating to governance	Governance Committee
2-01	<i>Begin</i> Develop multi-year fundraising plan	Fundraising Committee
2-01	Develop multi-year projections for govt., foundations, corporations' grants	Staff
2-08	Review financial systems & develop recommendations to monitor & project	Finance Committee & Staff
2-14	Regular Board Meeting	Board & Staff
2-28 3-1/2	NEA Progress Report #2 due <i>Site Visit work session w/ fundraising committee</i>	Staff
3-08	Draft Fundraising Plan <i>Exec Committee</i>	Fundraising Committee & Staff
3-14	Regular Board Meeting	Board & Staff

4-12	Mail Fundraising Draft to Consultant	Staff
4-15	Develop marketing & PR plan	Marketing Committee & Staff
4-19	<i>Site visit / put all pieces together</i>	
4-22,23,24	Assemble all aspects of Long Range Plan & draft	Staff
4-29	Mail Draft #1 to consultant	Staff
5-07	Board review Long Range Plan	Executive Committee & Staff
5-10	Draft #2 to consultant	Staff
5-16	Regular Board Meeting	Board & Staff
5-30	Receive recommendations on Draft #2 from consultant	Consultant
6-3,4,5,6,7	Finalize Draft of Plan	Staff
6-14	NEA Progress Report #3 due	Staff
6-18	Regular Board Meeting	Board & Staff
6-28	Mail Long Range Plan to M. Beene	Staff
7-04	Complete Phase 11 NEA application	Staff
7-12	Mail copy to consultant	Staff
8-09	Mail Phase 11 Application to NEA	Staff
8-30	Progress Report #4 to NEA	Staff

Approved:

Sheryl Warren, Board President



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2-28	NEA Progress Report #2 due	Staff
3-08	Draft Fundraising Plan	Fundraising Committee & Staff
3-14	Regular Board Meeting	Board & Staff

4-12	Mail Fundraising Draft to Consultant	Staff
4-13	<i>Site Visit Ellen review fundraising plan</i>	<i>Jeana</i>
4-15	Develop marketing & PR plan	Marketing Committee & Staff
4-22,23,24	Assemble all aspects of Long Range Plan & draft	Staff
4-29	Mail Draft #1 to consultant	Staff
5-6	<i>Site Visit w/ exec Bd.</i>	<i>staff + Bd</i>
5-07	Board review Long Range Plan	Executive Committee & Staff
5-10	Draft #2 to consultant	Staff
5-16	Regular Board Meeting	Board & Staff
5-30	Receive recommendations on Draft #2 from consultant	Consultant
6-1	<i>Final Draft to Ellen</i>	
6-3,4,5,6,7	Finalize Draft of Plan	Staff
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8-30	Progress Report #4 to NEA	Staff

Approved:

Sheryl Warren, Board President

IFCC ADVANCEMENT PROPOSAL

DETAILED PROJECT DESCRIPTION

.....Like so many small arts organizations the IFCC is the result of the right dream at the right time.....Like so many small arts organizations the successful survival of the IFCC is the result of the devoted efforts of a skeleton staff, each wearing many hats and all working like demented beavers to keep the dream alive....And, like so many small arts organizations, the IFCC often seems to be the best kept secret in town, dependent on supporters and the generosity of the media, hoping the word will spread because the dream is worth supporting.

The dream is worth supporting. But a year of analyzing and prioritizing and making our long range plan a working document has truly clarified where the lion's share of our attention and money must go to ensure the future of the IFCC as a respected institution, not just an admirable dream.

The IFCC is strong artistically because, since our inception, nurturing artists has been an absolute, unshakable priority. To become equally strong managerially and financially we must actively begin to nurture our staff and patrons. We must have enough skilled personnel in place to effectively reach out to the diverse communities we serve and encourage them to share our dream. And we must have the financial wherewithall to pay our staff competitive wages, market our programming, maintain an inviting physical environment, and take calculated artistic risks without threatening the survival of the organization.

The IFCC is requesting Advancement funding in the amount of \$75,000 for PERSONNEL DEVELOPMENT, MARKETING AND FACILITY UPGRADE, and THE ESTABLISHMENT OF A CASH FLOW RESERVE. THESE ARE IDENTIFIED AS PRIORITIES IN THE MULTIYEAR PLAN AND WILL ENABLE US TO SECURE THE FOUNDATION FROM WHICH PROGRAMS CAN BE DEVELOPED AND SHARED WITH THE PUBLIC MORE EFFECTIVELY.

The IFCC is fully prepared to take on the task of matching that contribution three to one.

\$210,000 (the bulk of the funding and match) would be used to develop PERSONNEL because no lasting growth is possible without the leadership of a decently paid professional staff of an adequate size to handle the artistic and administrative demands of the organization.

- * upgrade current staff salaries and establish competitive salaries for new positions.
- * cover employee payroll taxes and establish employee benefits program
- * increase the managerial staff (currently 2 positions) to include an Assistant Manager with strong computer skills and expertise in marketing.
- * provide for professional assistance in bookkeeping, secretarial services and graphic arts.

\$65,000 of the total is designated for MARKETING AND FACILITY UPGRADE, addressing the very visible need to improve the physical plant for the first time in ten years, and committing significant funds to the unique marketing challenge of reaching both a "macro-public" interested in multi-cultural arts and a "micro-public" attached to and only interested in a specific ethnic or cultural community.

- * establish a new logo and cohesive visual look for the IFCC, reflected in all printed material.
- * improve the physical facility, inside and out, in time for our tenth anniversary season: painting, new carpet, refurbishing the lobby, clarifying signage, purchase of a new marquee, landscaping and better outdoor lighting, outside banners and new mural created by a prominent local ethnic artist.
- * multi-lingual brochures and posters to promote IFCC in various communities.
- * graphic software for computer to generate more publicity materials in house.
- * Special events to maximize IFCC public exposure during 10th anniversary season.

FUNDRAISING PLAN

PAGE 2

The IFCC has emerged from phase I of Advancement planning confident of our ability to raise the required fiscal match. The incentives for giving have been identified, detailed strategies have been established, and the Board and Staff are already working on developing the necessary new funding relationships. It is clear that the IFCC must sustain its excellent track record with local foundations and government funding sources. It is equally clear that extensive and immediate work must be done to broaden our funding base with particular emphasis on increasing earned income through ticket sales, and diversifying sources of unearned income to include more fundraising events, individual giving, and corporate contributions. Further efforts must be directed toward reducing future reliance on government support and toward generating recognition from regional and national corporations and foundations.

Specific strategies and a time line for raising the Advancement match are detailed below:

MATCH # 1 (\$75,000) fiscal commitment to be documented by 11/1/91

City of Portland	\$34,000	committed
Meyer Memorial Trust	\$15,000	committed
Portland General Elec.	\$ 5,000	committed; increase
Collins Foundation	\$10,000	pending; current funder; increase
Rose E. Tucker Trust	\$ 4,000	pending; frequent funder;
Nike, Inc.	\$ 4,000	new
Higgins Foundation	\$ 3,000	new

MATCH # 2 (\$75,000) fiscal commitment to be documented by 11/1/92

Ticket income	\$10,000	"The Immigrant" / production underwritten and large percentage of tickets presold.
City of Portland	\$25,000	committed
10th Anniversary Party	\$10,000	pending; fundraising event
Portland Trailblazers	\$ 5,000	committed; increase
US Bank	\$ 5,000	pending; increase
Pacificorp	\$10,000	committed; new
Murdoch Foundation	\$ 5,000	pending; new
Autzen Foundation	\$ 5,000	pending; new

MATCH # 3 (\$75,000) fiscal commitment to be documented by 11/1/93

Ticket income	\$40,000	10 th anniversary season "best of" retrospective
Maya Angelou	\$10,000	pending; fundraising event
Meyer Memorial Trust	\$10,000	pending; current funder
Oregon Lottery	\$ 5,000	pending; new
Microsoft Corp.	\$ 5,000	pending; new
AT & T	\$ 5,000	pending; new



PHASE I SUMMARY

When the IFCC applied for the Advancement program in the fall of '89, our staff was small and our Board newly reorganized, but we were confident that our programming was strong, areas of concern had been accurately identified and felt there was good possibility that we would be accepted into the program. Little did we realize then, that acceptance into the program was only the first (and possibly the easiest) step in what would become the most challenging but fruitful year in the IFCC's history.

Even as the IFCC received the glorious news that we had been accepted into the Advancement program...even as we were coming to the delighted realization that at last we would have some much-needed long range planning assistance and the resources to document the results of that planning, forces were gathering to put us to the test: major changes occurred at City Hall in the Commissioner's office responsible for IFCC operations causing a shift in responsibility for this project; the upcoming artistic season was by far the most ambitious of any in IFCC experience, and tax revolt was brewing in Portland and the prospect of lost revenue was shaking the foundations of State and City government and the local funding community. Our new Board President was extremely careful to gather information and assess our circumstances before agreeing to provide the IFCC with professional leadership during this time.

The prospect of undertaking the work of Advancement while maneuvering through an artistically ambitious year, faced with community resources in a state of political upheaval and the City in the midst of managerial reallocation, was challenging to say the least. But we thrive on a good challenge!

We met with our consultant, held a Board retreat to establish priorities, organized committees and made task assignments and got busy. As we began the 1990-91 season we were financially stable, over-booked artistically, very short on staff, and full of excitement and anticipation about our plan. By January of '91 overindulgence and sheer fatigue had taken over. We had a program plan, but meanwhile, current programming had been far more successfully received than anticipated, a wonderful turn of events that caused even longer hours for the staff (all two of us). Our small Board was feeling inundated by all the meetings they had attended during the fall, so by January it was difficult to get everyone started again after the holidays. On top of the seasonal fatigue, the tax reform measure had become a reality and regular funding sources were declining our proposals, leaving the IFCC in a cash flow crisis for the first time ever. That was the low point, difficult at the time but in retrospect a real opportunity for Board and staff to pull together and move the organization forward.

By late February real positive energy had re-entered the organization along with a renewed commitment to our mission and we got busy again. Staff hired temporary help, the Board redoubled committee efforts and completed their assignments for the plan, political unrest at City Hall settled down and the first show of our mainstage season was a hit!

By June of '91 we had executed twelve productions, not lost one staff member due to burnout, rearranged financial circumstances to meet our obligations, guided ourselves through a transition from one city department to another and completed our three year plan.

Both staff and Board take pride in the accomplishments of the past two years since we began the Advancement process, are currently enjoying the beginnings of that plan in action, and look forward to Phase II.



FUNDRAISING PLAN

Participation in the planning phase of Advancement enabled us to analyze our approach to fundraising, identify areas of strength as well as possibilities to be explored, and develop strategies for the growth necessary to achieve the required match. Though raising the match represents a significant increase in our fundraising activity a variety of fortuitous elements are coming together, putting the IFCC in a strong position to achieve its Advancement goals:

- ☐ The very real possibility of losing City funding due to a restructuring of local taxes and subsequent budget cuts has already resulted in increased Board participation in the management of the IFCC, particularly in the area of fundraising. This broadens IFCC access to potential funders, and sets a precedent of working ahead to nurture funding sources. Additionally, local funders are sympathetic to fiscal needs created by City budget cuts and appear responsive to Board requests.
- ☐ Participation in the Advancement program and the existence of a comprehensive three year plan suggest credibility and stability to potential funders.
- ☐ The planned increase in staff as of 1/92 will free up the Executive and Producing Directors to develop more funding sources and write more grant proposals. Further, the new staff member will be skilled in marketing, resulting in greater public awareness, increased attendance, and the creation of a broader base of support for the IFCC.
- ☐ The computerization of the IFCC (a direct result of phase I of Advancement) facilitates the fundraising process for staff and Board, improving presentation and making it possible to generate proposals more efficiently.
- ☐ A significant reduction in ticket prices paired with the increased visibility of the IFCC will stimulate sales and establish a stronger balance between earned and unearned income.
- ☐ The celebration of our tenth anniversary season occurs during the time period in which we must raise the Advancement match, providing the optimum opportunity to solicit major support and hold special fundraising events. Public awareness will be at an all-time high, and the "best of the IFCC" season is designed to maximize ticket sales.



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MULTI-YEAR PLAN SUMMARY

This current year marks a time of significant transition for the IFCC, particularly in the areas of governance and financial management. Having functioned as a City-run organization with minimal Board input, the IFCC is now in the process of evolving into an independently managed organization with a full working Board of Directors leading the way. A negotiated relationship with the City of Portland will be maintained, but Board and staff are assuming greatly increased responsibility and control of the IFCC's future.

The combination of impending independence and participation in the Advancement program has propelled us to examine all aspects of our operation with care and honesty. Throughout the process we have remained confident of our purpose as an organization and the areas of programming that best reflect that purpose. The real revelations have been the result of the intense interaction and attention to communication that the process demands, the detailed analysis of management systems and policies (or lack thereof), and the challenge inherent in determining priorities and becoming realistic about our dreams in relation to available resources. We have gained specificity and clarity, but most importantly we have reached an unprecedented level of cooperation and shared purpose between Board and staff.

As a result of great effort on the part of staff and Board, an IFCC three year plan emerged that clearly addresses our concerns and articulates our resolves. The various attachments, *Mission and Philosophy Statements*, *Project Narrative*, *Programs-at-a-Glance*, and *Organizational Chart*, are well thought out and informative, and provide the necessary background information for the detailed sections that follow. Those sections include *PROGRAMS*, *MARKETING & PUBLIC/COMMUNITY RELATIONS*, *FUNDRAISING*, *FINANCIAL MANAGEMENT*, *STAFF*, *GOVERNANCE*, *FACILITY*, *BUDGET*, and *BUDGET NARRATIVE*.

While **Programs** shows a refinement of the current areas of IFCC programming and proposes a detailed production schedule, **Marketing** emphasizes the unique opportunity to promote and celebrate as the IFCC draws closer to its 10th anniversary season. **Fundraising** carefully identifies the IFCC strategy for raising the required Advancement match and **Financial Management** outlines plans for fiscal accounting, tracking and reporting. **Governance** explains the changing relationship between the IFCC and the City of Portland, and the areas of responsibility that will need defining and assigning as the IFCC (not by choice) moves toward complete financial and managerial independence from the City. The **Facility** section describes a much needed face lift to encourage greater visibility and usage, and prepare for the 10th anniversary year. And the **Staff** section reflects a commitment to stabilizing the positions, functions and compensations of IFCC employees.

Each section of the plan has been designed to ensure the growth and stabilization of IFCC personnel, to increase and focus marketing efforts and nurture public relationships to stimulate greater usage of the IFCC facility and services, and finally to create a future of financial security.

MULTI-YEAR PLAN SUMMARY PAGE 2

The intense process of self-examination that produced the plan on paper also produced a clear understanding of what the IFCC's priorities must be as we proceed to implement the plan in actuality:

- * Adjusting the amount of internally produced programming to allow staff to address management priorities.
- * Actively incorporating the Board into IFCC management and operations, particularly in the areas of planning, establishment of policy , and fundraising.
- * Formalizing the IFCC/City relationship in order to establish effective internal management systems and clarify responsibilities.
- * Assuming internal control of all financial management, fiscal planning and responsibility for the financial solvency of the IFCC in order to plan realistically and budget accordingly, and deal effectively with cash flow.
- * Developing new sources of funding, particularly working to attract more individual and corporate donors. Additionally developing annual fundraising events so that donations are not the only source of unearned income.
- * Addressing the pressing need for additional personnel to accomplish the goals outlined in the plan, upgrading staff salaries and benefits, and contract labor fees, establishing personnel policies and clarifying division of responsibilities.
- * Serving the public as well and thoroughly as we currently serve our artists: Increasing patron usage of the IFCC by creating a new look, improving the facility cosmetically to provide a more inviting atmosphere, and focusing increasing our marketing activities under the direction of a qualified staff member.

GROWTH FOR THE NEXT THREE YEARS WILL NOT BE EVIDENCED BY INCREASED PROGRAMMING ACTIVITY OR BY ANY SIGNIFICANT CHANGE IN THE TYPE OF PROGRAMMING WE DO. RATHER, GROWTH WILL BE MEASURED BY OUR ABILITY TO MAINTAIN ORGANIZATION OF ALL MANAGEMENT SYSTEMS, INCREASE PUBLIC SUPPORT OF OUR EFFORTS IN TERMS OF BOTH FUNDING AND PATRONAGE, AND DEVELOPMENT OF A STRONG STAFF AND BOARD TO LEAD THE IFCC INTO THE FUTURE.

Consultant Narrative for The Interstate Firehouse Cultural Center

1. Describe the organization's participation in Advancement Phase I.

The IFCC began the Advancement process last fall with the creation of a Board Planning Committee (the Executive Committee served this function) and a careful assessment of the issues and opportunities facing the organization. The two full time staff members followed the process through with extended and regular discussions over mission, purpose and goals. A Board retreat was held in October at which time, a new mission statement was approved as were the goals and general program directions. Using this as the basis, the staff developed the programming plan. The Executive Committee reviewed this plan and made comments and suggestions. These were incorporated into the draft. The Executive Committee continued to be involved and took a leadership role in wrestling with issues of governance and fundraising. Laurie McDougall did a site visit in January to assist in the development of the marketing plan. As the Advancement Consultant, I made day long site visits almost monthly and would work intensely with staff during these times. The process involved the Board President and Vice President in in depth discussions about the future direction of the IFCC.

2. Comment on the participant's long range plan, including its appropriateness, and the organization's ability to implement the plan and their capacity to make the 3 to 1 match

The plan is an ambitious one, one which some might believe to be too ambitious for an organization of this size. However, in actuality, it represents a refinement and focussed approach to programming which has, in the past, been diffuse. The scope of work outlined in the latter years of the plan may prove too ambitious but safeguards and processes are being put into place to evaluate the feasibility of full implementation. The organization will move from a government-based operation to a fully nonprofit, independent group by the second year of the plan. This will require that additional management and financial systems are put into place. The IFCC is anticipating this and beginning to develop these procedures. While fundraising is likely to be challenging, the IFCC occupies a unique niche in Portland and enjoys significant fundraising potential. I feel confident they will be able to make the Advancement match.

3. Describe the process that has (or has not) been put into place for continuing the planning process, and the organization's commitment to it

The IFCC feels that the planning process has helped them wrestle with difficult issues facing the organization and that continued planning and monitoring will be necessary to ensure responsible implementation of the plan. As a result of Advancement, the IFCC Board has moved from an informal advisory committee to a fully operating unit. The Executive Committee is a committed group of individuals who each personally care about the organization. This core group's continued involvement will be important for the group to make the transition that will be required. The IFCC envisions utilizing annual board retreats to update the plan and evaluate their progress. Expansion and strengthening Board members involvement should be a priority in the coming year. This will be necessary to effectively implement the 10th Anniversary Year envisioned by the organization.

4. Describe the strengths and challenges that you feel the participant faces as it enters Advancement Phase II

The greatest challenge IFCC will face is effectively making the transition from a government based operation with a "safety net" to a fully independent 501 (c) 3. The City Ordinance passed last year, called Measure 5, will substantially reduce their city support by 1992. Increasing earned income and nongovernment fundraising will be

important to their success. Because they do not serve an audience who has the ability to make significant individual contributions, they will need to substantially increase the number of individual contributors. The IFCC is uniquely positioned in Portland to meet certain arts/social service objectives which can be appealing to the business community. Raising their profile through effective marketing and public relations can assist significantly to this end. The greatest strength of the IFCC is their clarity of mission and the special function they serve in the Portland arts community. They are an organization which was founded on cultural diversity and their ideals are reflected in their programming philosophy. Corresponding to this clarity is the commitment of a core group of artists who are actively involved in the organization.

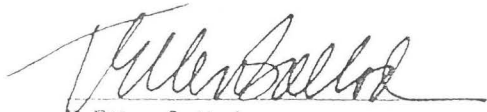
5. Comment on any managerial or artistic changes in the organization that may have affected the organization's artistic quality or activities

The IFCC continues to operate under the direction of their founding director. The addition of a producing director in the past 18 months has strengthened their in house productions and contributed to the quality of community productions to which she provides assistance and guidance. I suspect that the IFCC is stronger artistically now than it was at the outset of Advancement. Nothing has occurred in the organization to negatively affect its operations, artistically or managerially.

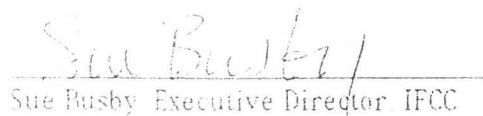
6. Comment on the condition of the organization's financial and managerial systems at the beginning of technical assistance and at the time of Phase II application.

At the beginning of the Advancement process, the IFCC relied on the Office of the Commissioner in Charge (in city government) for many of their basic operating functions including the use of a copier, all book keeping and central services. The organization had no computer, no copier and few in house systems for managing or tracking resources. While the IFCC had been very successful in securing press coverage, they had not developed marketing strategies designed to increase the number of paid audience members. Through Advancement they were able to purchase a computer and word processing, financial management and desk top publishing software. They also were able to acquire a copier so that many needless trips to Kinkos and to city hall were eliminated. In addition, through the assistance of consultant Laurie McDougall, they prepared a marketing plan which includes cosmetic improvements to the physical plant which are designed to make the facility more attractive and inviting. Because they are only now beginning the full transition to nonprofit operating status, they are still putting into place the management and financial systems they will need to make the transition.

Advancement Phase II comes at a critical time for the IFCC. This infusion of funds will enable them to begin to address the compensation issues for staff other than the executive director and will help them make the called for transition.



Ellen Sollod
Advancement Consultant



Sue Busby Executive Director, IFCC

IFCC PROGRAMS AT-A-GLANCE

1990-91

JULY	Passin'Art: HUNTER Lecture/Show: LORNA SIMPSON	Rental IFCC
AUGUST	SUMMERSTAGE PORTLAND POETRY FESTIVAL	IFCC/Production camp Rental
SEPTEMBER	FOR BETTER NOT FOR WORSE	Rental
OCTOBER	NEWCOMER HANAKUSO OLIVER LAKE CONCERT	IFCC Student Series IFCC New Faces Reading Rental
NOVEMBER	Portland Accessible Theatre: EVENING OF ONE ACTS	Rental
DECEMBER	FEATHERS OF FIRE RAINTREE	IFCC Student Series IFCC New Faces Reading
JANUARY	MOST VALUABLE PLAYER BAIKAL	IFCC Student Series IFCC New Faces Reading
FEBRUARY	WHEN WILL I DANCE?	IFCC Mainstage Season
MARCH	CARRY ON, DEAR BLOOD BEYOND VIOLENCE: America's Choice of Self-Image	IFCC Mainstage Season Rental
APRIL	MEI MEI BANZI CONCERT	IFCC Mainstage Season Rental
MAY	NW Theatre of the Deaf WINDOWS	IFCC Mainstage

12 GALLERY EXHIBITIONS

**ONGOING AFRICAN DANCE AND DRUMMING CLASSES
ONGOING JEFFERSON HIGH SCHOOL DANCE CLASSES**

APPLICANT ORGANIZATION OVERVIEW

1. What is the purpose of your organization?

Nine years ago the need emerged for an arts center that would bridge the gap between the diverse, multi-cultural society we claim to be and the cultural inequities that have, in fact, been entrenched in our Euro-dominated system since its inception. The requirements were modest: a facility where underrepresented visual and performing artists from a variety of ethnic/cultural backgrounds could pursue their work, develop their skills and share their unique visions. Community leaders, artists and government joined forces in a singular collaborative relationship to address the need for a multi-cultural arts center. The result: the Interstate Firehouse Cultural Center (IFCC), housed in a historical landmark fire station and renovated to include a 110 seat theatre, a visual art gallery, a dance studio, office and public space.

The people who created the IFCC had no blueprint to follow. They were among the first to grapple with the tremendous challenges and possibilities inherent in serving such a broad range of cultures as well as artistic disciplines. But they forged ahead, and though the programming has been refined over the years, the purpose has never wavered, and is expressed clearly and directly in the IFCC mission statement:

THE INTERSTATE FIREHOUSE CULTURAL CENTER (IFCC), A COMMUNITY BASED ARTS CENTER, IS COMMITTED TO CREATING AN ENVIRONMENT IN WHICH PEOPLE OF EVERY ETHNIC/CULTURAL BACKGROUND COME TOGETHER AS ARTISTS AND AUDIENCE TO EXPLORE, PRESERVE AND CELEBRATE THEIR DIVERSITY.

Our "user friendly" facility provides the necessary environment; our staff the necessary nurturing and guidance. This strong foundation enables our artists, at whatever stage of development, to speak responsibly and honorably, producing a profoundly provocative experience our audiences have come to expect.

A great deal of time and energy has gone into establishing the areas of programming that best reflect the IFCC's purpose:

- * A cross-cultural mainstage theatre season balancing established scripts with premieres of new work that confront important issues of color and culture or examine universal themes from an ethnic/cultural perspective.*
- * A series of matinee performances specifically focusing on issues of concern to young audiences, always expressing a strong cultural perspective and often curriculum-related.*
- * Evenings featuring the reading of a new script followed by a moderated discussion between playwright and audience and a reception with culturally-appropriate food and music.*
- * Monthly visual art exhibitions, usually featuring the work of regional artists, but when possible and appropriate, offering a national touring exhibition.*
- * A summer production camp for "youth at risk" providing mentors from the professional arts community, and offered in collaboration with Self-Enhancement, Inc., an organization designed to expose young people to options and alternatives.*
- * A collaborative producing relationship with one emerging theatre company (currently NW Theatre of the Deaf) in which IFCC provides administrative support and production assistance.*
- * Classes taught by independent instructors.*
- * Performance space rental to independent companies and performers, and rental of the facility for community use.*

This ongoing explosion of activity, frequently arising out of ideas and projects proposed by members of the artistic community, confirms the validity of the deep-seated belief that fueled the creation of the IFCC: Given opportunity and a supportive environment, visual and performing arts reflecting a range of ethnic/cultural perspectives will flourish.

Ultimately, everyone involved in IFCC activities shares the belief that the arts can, and must, go beyond mere decoration or entertainment. We are committed to an artistic process that encourages risk-taking and celebrates inclusion, fueled by an artistic philosophy that seeks to illuminate the universality of human experience through the unique perspectives of diverse cultures.

APPLICANT ORGANIZATION OVERVIEW

2. **Organizations with artistic programming:** Provide a summary of the development of your organization's artistic programming, audiences, and management over the past three years. **Other organizations** (e.g., Arts in Education, service organizations): Provide a summary of the development of your organization's activities, the people they serve (or the nature of your membership), and your management operations over the past three years.

Live theatre currently represents the most important component of IFCC programming, offering the greatest potential to reach the widest possible audience, and the opportunity to work with the greatest number of artists. An active theatre season, developed and overseen by a Producing Director, has always included three or four mainstage productions reflecting a strong ethnic/cultural perspective. The IFCC introduced Portland audiences to such provocative scripts as *YANKEE DAWG YOU DIE* ('89) and *THE COLORED MUSEUM* ('90). In 1990-'91 our season grew to include premieres of original work, an additional series of productions specifically directed at student audiences, and *NEW FACES*, a series of readings of three new scripts by local ethnic playwrights. The IFCC continues to share resources with "homeless" companies such as Portland Accessible Theatre, and maintains an ongoing collaborative producing relationship with one emerging company (currently NW Theatre of the Deaf). In 1990 our long-standing commitment to the social and emotional value of arts education was focused on youth "at risk" through *SUMMERSTAGE* a production camp taught by local arts professionals.

Our art gallery, under the direction of a part-time gallery coordinator, continues to provide the opportunity for visual artists from underrepresented ethnic/cultural groups to prepare themselves and their work for other professional exhibitions. The exhibition changes monthly, and artists gain valuable experience in mounting a show, generating press coverage, hosting a reception and marketing their work. Occasionally we are pleased to be able to offer a national touring exhibition such as the recent "Field to Factory" from the Smithsonian('89). But as with our theatre programming, we remain pledged to honoring and developing local artists first. Due to limitations of space and money, gallery programming has not changed significantly over the past three years, nor will it change radically in the foreseeable future.

Our audiences reflect a mixture of those who come regularly to IFCC productions and others who come because of their interest in the particular ethnic/cultural group featured in the current play or exhibit. While a priority of the multiyear plan is to increase paid attendance for the mainstage season since this has remained largely static over the past three years, we have seen a significant increase in the racial and ethnic mix present for each production. We have experienced a measurable increase in attendance in our Student Series which played to 1,500 young people in 1989 and 4,500 in 1991. Similarly the New Faces Reading Series, initiated in 1991, expanded our audience base, playing at an average 80% capacity. Increase in theatre programming has also improved gallery attendance. Audience reach is primarily in the Portland metropolitan area.

In the past three years, we have made significant improvements in IFCC management systems. In 1989 a full time Producing Director was added to the staff to oversee production activity and assist the Executive Director in an administrative capacity. The IFCC Board of Directors (an advisory group until 1989) has assumed leadership responsibilities in the areas of governance, long range planning and fundraising, and is working to formalize a new relationship between the IFCC and the City of Portland. The Advancement planning process, facilitated by the acquisition of a computer and a copy machine, played a significant role in the IFCC's evolution from a quasi-City agency to an independently managed arts organization. Management responsibilities are being clarified, systems for fiscal record keeping and reporting are being established, and operating policies are being refined. Advancement Consultants assisted the IFCC in formulating marketing strategies and a facility improvement plan. In addition, we have begun to address issues of graphic identity so that we are more effectively represented to the constituency we serve as well as current and prospective funders.

APPLICANT ORGANIZATION OVERVIEW

- 3. Organizations with artistic programming:** Describe how your organization fits artistically into your local community. Do you complement and/or work with other arts organizations? Other organizations (e.g., Arts in Education, service organizations): Describe how your organization fits into your local community and how it complements and/or works with other organizations related to your program area.

Our very specific cross-cultural mission ensures that we do not replicate the programming of other arts organizations. Rather, we compliment and add to the range of existing opportunities in Portland. By concentrating on showing the work of underrepresented visual and performing artists we heighten awareness among local arts organizations and patrons of the diversity of vision, style and subject matter available here, bringing gifted artists and their work to the attention of a broader community. Our own theatre season is supplemented by productions generated by independent companies, and we maintain a collaborative producing relationship with one emerging company. On all levels the IFCC provides professional guidance, training, and exposure for artists creating from a strong cultural perspective, and our artists consistently go on to work and exhibit in other professional theatres and galleries. The IFCC is well known and heavily used as a people resource and advisory/referral service by both the arts community and the community at large. Because of the nature of our personnel and programming, we enjoy unique access to many culturally based groups and service organizations, and high visibility within local ethnic/cultural communities. Our audience demographics reflect this broad based community involvement. Other forms of outreach include participation in local arts alliances; hosting the upcoming regional Open Dialogue Conference; our ongoing commitment to serving local youth, educators and schools by offering curriculum- enhancing, culturally diverse programming and arts education opportunities created in collaboration with other service agencies. Finally, we encourage community use of our facility for everything from political symposia to poetry readings to wedding receptions. We believe that people may originally come for a party or a meeting, but once they discover the IFCC they will return as patrons of the arts.

- 4. Within your program area, describe your organization on a regional or national level.**

The IFCC remains one of the few arts organizations in the Pacific Northwest dedicated to serving a broad range of cultures and arts disciplines. We are part of a growing regional network of visual artists, theatre companies, and most especially, playwrights, all involved in creating and producing new material that focuses on pressing issues of culture and ethnicity. Increasingly we find that our own reputation is growing, and that companies and artists are seeking us out...traveling to our exhibitions and productions, and calling us for access to artists and material. This intensified contact and sense of community is both welcome and necessary, expanding our knowledge of available scripts and personnel, and stimulating the ongoing interaction among artists so necessary for creative growth. The upcoming IFCC-hosted Open Dialogue Conference will actually bring many of these artists together to cement long distance relationships. Over the past two seasons, our theatre has welcomed guest actors, directors, and playwrights from Seattle, South Africa, Chicago and California. The IFCC gallery regularly exhibits work by regional artists and is occasionally able to feature a national traveling exhibition. At this point in our development we are stimulated by the contact with artists from the "outside world", but we are careful to balance our use of regional artists with our primary commitment to the development of local artists. Similarly, though we consider the IFCC a potential prototype for cross-cultural arts efforts in other cities, and we would welcome national attention for our efforts, our immediate intent is to concentrate on continued strengthening and development of local and regional relationships. As we expand staff and increase marketing efforts, we can look toward our 1992-93 tenth anniversary season as an appropriate time to generate national attention and further explore opportunities for participation in the national arts arena.

NATIONAL
ENDOWMENT
FOR
THE ARTS

WASHINGTON
D.C. 20506



A Federal agency advised by the
National Council on the Arts

April 2, 1992

MEMORANDUM

TO: Advancement Grantees

FROM: Donna DiRicco
Acting Grants Officer

Enclosed is a copy of Addendum B, which was omitted from your original grant award package because it was not ready for mailing at that time. This document contains additional general terms for Advancement grantees. If you have any questions relating to Addendum B, please call the Donations Coordinator in the Grants Office at (202) 682-5403.

NATIONAL
ENDOWMENT
FOR
THE ARTS

WASHINGTON
D.C. 20506



A Federal agency advised by the
National Council on the Arts

March 29, 1991

Sue Busby
Executive Director
Interstate Firehouse Cultural Center
5540 N. Interstate
Portland, OR 97217

Dear Ms. Busby:

After completing the Phase I technical assistance portion of the Advancement Program, your organization will become eligible to apply to Phase II. This phase of Advancement is a competitive application process which provides Treasury grants that must be matched on a three to one basis. However, there is no guarantee that organizations completing Phase I will receive grants.

Sincerely,

Vickie Benson, Program Specialist
Advancement Program

NATIONAL
ENDOWMENT
FOR
THE ARTS

WASHINGTON
D.C. 20506



A Federal agency advised by the
National Council on the Arts

March 28, 1991

Sue Busby
Executive Director
Interstate Firehouse Cultural Center
5340 N. Interstate
Portland, OR 97217

Dear Ms. Busby:

Thank you for progress report #2 for the IFCC. Most Advancement organizations experience that which you call jet-lag at one time or another, and eventually find the energy to devise a multi-year plan which becomes valuable to them. I'm glad to hear that your planning process is advancing.

I appreciate your comments and suggestions regarding consultants chosen for the Advancement program. I can assure you that every effort is made to match an appropriate consultant to each participating organization. Melanie Beene, the independent managing consultant, is very careful and serious about making a good match--I am sure she will also appreciate your suggestions. It should be interesting for you to know that this team of consultants is culturally diverse.

Again, it was good to hear about your progress. Please contact me or my assistant, Karen Leies, if we can be of assistance to you in the coming months of Advancement.

Sincerely,

Vickie Benson, Program Specialist
Advancement

IFCC BOARD OF DIRECTORS

1990-1991

Sept, 1990

PRESIDENT

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5006 N.E. Mallory, 97211

Carol Edmo
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or 630 S.W. 5th, ofc

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IFCC
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Portland, OR 97217
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H: 636-0794

PRODUCING DIRECTOR

Judy Yeckel
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Ellen Sallod
NEA Consultant
(206) 684-7171 w
" 324-7644 h

IFCC RETREAT
Friday, October 26, 1990

Attendees: Sue Busby, T.J. Lowe, Judy Yeckel,
Edith Kilbuck, Pete Vlahos, Sheryl Warren,
Bernadette Artharee, Ellen Sollod,
Jeana Woolley, and Peggy Ross.

Ellen Sollod, an advancement consultant, opened the meeting on Friday, October 26, 1990, at 7:30 p.m., and stated the purpose of the retreat to review the advancement process and the timetables. IFCC is the lucky participant of the National Endowment for the Arts (NEA) Advancement Program (money will be available for IFCC at the end of this process). ** pending the successful completion of a long range plan.*

The process is designed to recognize those organizations which achieve artistic heights and whose organizational structures may not have kept up, or organizations which are at a point of going to the next plateau. The real framing of the advancement process is around developing multi-year plans with these organizations. IFCC's advancement application, to be submitted at the end of this process, will be evaluated not on whether or not NEA likes the plan or not, but whether *outward* IFCC's plan:

1. reflects what IFCC said it was trying to do;
2. reflects that there has been a meaningful process with the Board, community and organization;
3. is likely to be accomplished. (Can be ambitious.)

This Board retreat has various purposes:

1. an opportunity to reaffirm and clarify the goals and directions of the IFCC;
2. to realistically place the organization in your own minds in the context of this community, and *identify* circumstances affecting the organization;
Isn't this the same thing?
3. identify short and long term future events affecting IFCC;

IFCC Retreat
Friday, October 26, 1990
Page 2

4. make realistic projections for the IFCC;
5. identify what opportunities exist and can be created for IFCC;
6. clarifying Board roles and responsibilities; and
7. identify some areas for skill development, such as fundraising, and training.

WHO HOLDS THE KEY TO SUCCESS IN THE IFCC?

these are not a who (?)
Board, community, staff, anyone involved in the projects, group spirit, partnership, and artists. The City and its relationship to IFCC is unique to this organization compared to other organizations. *the success of*

ORIGIN OF THE IFCC, ORIGINAL VISION, AND MISSION

redesigned
Sue Busby provided a historical background of the IFCC. The original eleven member Board - architects, managers, designers, and artists - was very active, because at that time, the building was gutted out and an entire facility had to be re-staged. The Board worked with the Commissioner, who initiated a \$0.5 million grant from the federal government and a matching amount of \$30-40,000 from the City, to renovate the building.

The Commissioner played a very key role in the inception of IFCC because he and the Board actively communicated with each other. Later, the relationship between the Commissioner and IFCC became very different. Currently, IFCC does not have a Commissioner who communicates on the level that the original Commissioner communicated with the Board. As a result of that changed relationship, the original Board left the ranks because the members could not figure out what they were supposed to be doing and to whom they were supposed to report.

IFCC Retreat
Friday, October 26, 1990
Page 3

The original mission of the Board was rebuilding the facility. The by-laws and articles stated a certain role of management in partnership with the City. Language is also included which states that the project will become self-sufficient and self-sustaining; however, the City would continue to play some sort of role in the development and progress of the IFCC.

During the last eight years, the developments in the IFCC have been on the programming side since the management ^{fiscal} of the IFCC was left in the hands of the City, leaving Staff to concentrate on programming.

THE ORIGINAL COMMISSIONER'S VISION OF THE IFCC'S PROGRAMMING

Sue discussed the programming at IFCC stating that originally the phrase "minority/ethnic artists" was used, changing to "ethnic/cultural" in 1984-85, to the currently used "underrepresented group". Sue described the events leading to the birth of IFCC, as follows.

A group of black artists went to Charles Jordan requesting that the City fund a small theater supporting black playwrights. Charles took the request to Council, which rejected it because the City was not willing to support yet another small theater (Portland already had 32). Since Charles was Commissioner of Parks and Recreation and had connections on the federal level, Charles attempted to fund IFCC through a federal grant. However, the request was again rejected, stating that the Department of Parks and Recreation does not properly fund theatres. However, hope was given because, included in the rejection, interest in a cultural center which included recreational facilities was expressed. Charles put together a proposal for a cultural center which has a 90-fixed seat theatre with a green room, dressing room, showers, a park next door, and was the largest space in the facility. The proposal was accepted.

The renovation of the building continued but the original intent or desire for the facility to focus on

*this refers
to the theatre
but you'd
never know it.*

IFCC Retreat
Friday, October 26, 1990
Page 4

underrepresented artists resulted from Isaac and his sister requesting a black theatre. The first event in the facility featured 22 black artists. Four hundred people came to the opening which featured Russian dancers, Middle Eastern belly dancer, gospel music, singers, and art was everywhere. Everyone realized that something very special could happen with the IFCC! America is not a melting pot. The Commissioner realized at that point it was ok if the IFCC was not an all-black group. He developed a habit of strolling unannounced through the IFCC just to see what was happening and was always amazed at the variety of art in the gallery.

*true, but
what is this
statement doing
in the middle
of this P?*

The current Commissioner expressed a desire to eliminate support to IFCC, making it self-sustaining. Al Jamison helped the Commissioner realize what a political loss would result for him to disown the IFCC and eliminate its funding. The new Commissioner is supportive, however, he does not understand how he can use an organization like IFCC politically as well as personally.

grammar

REGIONALLY AND NATIONALLY, HOW DOES IFCC COMPARE TO OTHER ORGANIZATIONS?

Judy stated that, both regionally and nationally, IFCC is a unique organization with its multi-cultural emphasis. Most organizations are identified with a specific group; however, IFCC is not group-specific. Although the IFCC is known in the Portland region, at this time, it is not recognized on a national scale. Currently, a new trend is developing for organizations to have a multi-cultural emphasis. Because the IFCC has eight years' experience providing multi-cultural projects to the community, the IFCC has a strength in areas other organizations are only beginning to recognize. The future will bring a broader recognition to IFCC for the type of work it has been doing all along.

Sue explained that, basically, there are two types of services provided by the IFCC: leasing space for community projects; and producing programming. Various uses of the facility through the years are as follows:

1. First event (described above) leased space to the group producing the show;
2. Commissioner indicated interest in student productions. Jeff Ditzler, from the Overlook Program, brought a group of 300 students to the IFCC in March, 1983;
3. Janice had a dance variety show for 5-6 years;
4. Jefferson High School leased space for dancers during the last two years;
5. Leased space for Kaiser Hospital's Jazzercise classes; and
6. Currently, an African dance group uses the facility.

This certainly doesn't really reflect how we use the space

WHAT PERCENTAGE OF THE GENERAL OPERATING BUDGET COMES FROM THE CITY?

Sue explained that the first year's operating budget was the amount leftover from the federal and City grants, \$40,000. At that time, Sue was the only one working for IFCC, which explains why the first event in the facility involved leasing space, rather than producing the show using IFCC staff. The subsequent arrival of Jeff Ditzler and 300 students brought real incentive for Sue to become an avid fundraiser.

In the first year, \$20,000 was raised in grants. In 1982, 1983, and 1984 the City increased its contributions from \$30,000 to \$50,000. During 1984-1985, the City further increased its funding to \$57,000. The City's funding reached a high in 1989 of \$80,000 and is currently \$60,000. Jeana noted that originally, the IFCC was funded 100 percent by the City, and now is funded 50 percent by other sources, such as grants.

Along with fluctuating funding, changes in the Board have occurred simultaneously. Sue explained that the initial Board was disheartened and eventually resigned when its plans were changed downtown. IFCC has not had a working Board for the last four years. The current Board formed in the Summer of 1989.

IFCC Retreat
Friday, October 26, 1990
Page 6

The group recognizes that it has a need to focus its development. Pete offered his perception of IFCC as primarily an educational facility. Judy said this issue needs focus this year: what direction should the IFCC take - educational, professional, both? Ellen concurred stating that it is important that IFCC have a meaningful sense of direction because it will speed IFCC's growth and development.

EVALUATION LOOP

Inputs \$, Staff, Time, Theatre *? Does this mean artists?* are brought together to create performances
then,
Miracle occurs
leading to
Outputs Performances, Workshops, Classes, and Exhibitions
and
Extraneous Outcomes Press coverage, community visibility, Artists' recognition

The ENVIRONMENT influences this process and is not always recognized as a factor which affects the accomplishment of the organization's goals, and sometimes controls the outcome of actions taken.

DEFINITIONS

- A. **Mission:** statement of purpose, raison d'être, lofty, open-ended, never fully realized
- B. **Goals+** open-ended value statements, qualitative
- C. **Objectives** results oriented, time bound, observable and/or quantifiable.
- D. **Strategies** programmatic responses designed specifically to meet objectives.

IFCC Retreat
Friday, October 26, 1990
Page 7

Picture a pyramid with the peak at the top. The mission is the peak and the goals, objectives, and strategies compose the increasing size of the pyramid with the strategies, the definitive actions to be taken, composing the largest and widest section of the pyramid.

Find the overlapping areas of the following:

- The City's needs and wants;
- The Community's needs and wants;
- Vision and Mission of IFCC.

External Realities

- constituent and audience expectations
- market and operations environment
- City's expectations

Internal Desires - Mission, Vision, and Dreams

Internal Realities

- Staff
- Resources: money and time
- Relationships with the City
- Facility

Imagine a watering can and a growing plant.

MISSION STATEMENT

Ellen explained that the advancement process streamlines the purpose of an organization to accomplish the mission. She noted that, in the arts in particular, artists can be zealous and non-focused and may not accomplish their goal. Arts organizations are not primarily money-driven. Ideas are plentiful in arts. It is very important to focus to use only the germane ideas to achieve the mission. The group must discriminate between opportunities, choosing those opportunities which lead to the achievement of the mission.

IFCC Retreat
Friday, October 26, 1990
Page 8

Jeana noted that although the mission statement is intended, by definition, to never be totally achieved, however, it is currently being achieved in small steps now.

TJ had several suggested changes to the mission statement. He suggested, and the group agreed, to add the word "preserve" to the phrase "to explore, celebrate and preserve their diversity". Judy noted that the addition of the word "preserve" is in line with the goal of not infringing on cultural heritage and cultural integrity.

TJ also recommended, and the group agreed, to change the reference to the "IFCC" to "Interstate Firehouse Cultural Center". TJ noted that he had never seen a mission statement which defines the organization. TJ suggested, but the group did not concur, to change the reference to "IFCC" to "we", making it a more personal reference.

Ellen stated that the group seemed to philosophically agree with respect to the direction of the mission statement. Ellen summarized the changes to the mission statement which now reads as follows:

The Interstate Firehouse Cultural Center, a community-based arts center, is committed to creating an environment in which people of every ethnic/cultural group come together as artists and audiences to explore, celebrate and preserve their diversity.

STATEMENT OF ARTISTIC PHILOSOPHY

Ellen proposed the following questions with respect to the statement of philosophy:

- What kind of feeling do you have about this organization?
- What does the statement of philosophy say to you if you came across it cold and read it, knowing nothing about IFCC?
- Do you think you would fit in this organization?

Jeana feels that the statement is inclusive.

IFCC Retreat
Friday, October 26, 1990
Page 9

Edith said that although she had no problem with respect to the ideas expressed in the third paragraph, she disagrees with the particular expression of those ideas. For example, Edith wants to state realistically the IFCC's support for artists without dreaming, by stating that they should be compensated as others. In Edith's opinion, the term "fair wage" is inappropriate and belittling to artists. "Wage" is similar to hourly compensation. She prefers the term "appropriate fee".

Sheryl asked the group to whom is the statement of philosophy written? Jeana responded that it should speak to all audiences: artists, community, funders, staff, and the City. Everyone who has some ownership in the IFCC.

The Friday night session of the retreat adjourned at 9:45 p.m.

IFCC RETREAT
Saturday, October 27, 1990

Ellens Fax ↓ attn Ellen
206-684-7172 Sollod

or Fedex
fill it out so she
doesn't have to
sign it for

ROLE OF BOARD MEMBERS AND COMMITTEES

- I. Strengths of IFCC: WHAT IS WORKING
- A. Place people like to work: artists, performers, staff, Board, volunteers
 - B. Occupational diversity of the Board
 - C. Diversity and strength of Programming: Productions and Exhibits
 - D. Genuine interest and support for the artist
 - E. Staying power
 - F. Innocence/freshness of programs
 - G. Spillover into larger arts community (Sue's role in leadership)
 - H. Strength of leadership
 - I. Meeting diverse community needs
 - J. Resourcefulness
 - K. Provides and expresses a sense of pride
 - L. Educators - alternative for kids
 - M. Financial support and relationship
 - N. Talent of all involved
 - O. Mission: unique niche in the community
 - P. Provide opportunities for established/emerging
 - Q. Facility
 - R. Maintain artistic integrity
 - S. Volunteerism high
 - T. Valued staff

What is this
in reference to?

is there a word
missing here?
Is that word
artists?

WHAT IS NOT WORKING (OR COULD WORK BETTER)?

- I. Facility
- A. Physical appearance of outside (paint job) and functionality
 - B. Access to drive (lack of directional signage); need overspill parking marked by signage
 - C. Aesthetically inside (need to be non-smoking)
- II. Lack of Resources - need to increase private sector support (fundraising needs strengthening across the board)

Murray St. / Used to produce HEAT out
Prod. of NPR in
Nicholas Hill NYC

Linda Barry was a regular
on HEAT

she is in
Chicago

- III. Public awareness and identity needs strengthening and marketing
- IV. Inadequate staffing to the task
- V. Needs to create an organized and regular volunteer base. Investigate partnership with groups such as, Junior League.
- VI. Need more business sophistication in areas, such as: financial, marketing, and fundraising.
- VII. Creating operating policies - artistic and personnel
- VIII. Need to strike and maintain balance between freshness of programs, while having systematic operations.

Sue	Executive Director	1	FTE
Judy	Producing Director	1	FTE
Roberta	Gallery	.125	FTE
Will	FM Coord. Aud. DULMT		contract
Debilyn	Mrktg/writer 16 hrs/wk (64/mo)	.40	FTE
2 Custodians		1.15	FTE
Lam	Receptionist	.75	FTE

Artistic contract personnel (actors, directors, teachers)

Volunteers - roles: ushers

Need professional administrative support

IFCC's ideal relationship with the City would be to have status as a separate bureau.

Bogle Portfolio

fire department, public safety/911, IFCC

Lindberg

- MAC
- Liaison to Metro (PAC, Convention Center)
- Park Bureau (2 theatres)
 - community music center, dance company, IFCC
- IFCC (multi-cultural) \$57,000 + building + services

BOARD ROLES AND STRATEGIES

GGG - give, get, ^{OR} get off
WWW - wealth, wisdom, work
\$ \$ \$

Staff: make job of Board member doable
Board: never make a commitment you honestly believe
you cannot keep

Never do a "benefit" for community visibility purposes

- A. Fun
- B. Planning and Policymaking
- C. Finance (conservative)
- D. Fundraising (sky is the limit)
 - Staff: 80-90% revenue-grants, public, corp., fdn.
 - Board: 10-15%
- E. Advocacy public sector contributions and community relations
- F. Personnel Policies (develop Ad Hoc)
- G. Attendance at IFCC (volunteerism)
 - line item in Revenue from Board Members' contributions
 - FR projects benefits for community visibility

HOW TO MAXIMIZE BENEFIT OF PARK PROXIMITY CONSTITUENCIES IFCC SERVES

Primary

Audiences, Board, Staff
Artist, Friends, School
Child, Ethnic Population

Secondary

Press, Funders, City Government,
Schools, Neighborhood, Ecumenical
Ministry-Oregon, A M Alliance

*Why are these
isolated
as constituencies?*

Current Audience Composition

Public	60% white, 25-45/50 years old, college education, theatre patrons, politically progressive, outside N/NE, <u>average income</u>
Target	more diverse racial and ethnic mix in all audiences; broader theater audience; expand age reach (school - elders); seniors have needs to be met during day hours)

Does this mean middle class?

CURRENT CONDITIONS AFFECTING GROWTH

- A. \$ Fundraising
- B. Lack of Staff
- * C. Underdeveloped organizational profile
- D. Has a new Board
- E. Underdeveloped audience size (core audience is small)
- F. Over comp / no comp policy
- G. Different audiences for every show
- H. Governance
- I. Lack of marketing
- J. Finding niche in terms of "product development"

COMPETITION

MARKETING ← T.V., movies, home video, sports, food/dinner, general entertainment, academic theatre, downtown theatre

MAJOR THREATS AND CHALLENGES

- * A. Try to be too many things to too many people
- B. Measure 5
- C. Attitude of indifference among citizenry
- D. Saturation of good theatre available in Portland
- E. Lack of long-term vision
- F. Racism
- G. Location of facility
- H. Community perceptions

Public

- I. ^ Fear of controversy
- J. Artists' relocation and talent drain
- K. Staff burn-out
- L. Lack of support
- M. Big dream not matching resources - \$
- N. Lobby (presentation)

WHERE IFCC TO BE FIVE YEARS FROM NOW

- Carol
- capacity audience *marketing*
 - neighborhood program for children *programming*
 - finetuning programming
- Bernadette
- more diversity in cultural experiences; different art forms beyond theatre *artistic*
- Edith
- maintain unique quality and character (high quality learning process as well as high quality audience experience)
 - high quality programming
 - REMAIN OPEN TO ARTIST-INITIATED PROJECT
 - delineate between developmental and semi-professional programs
- Jeana
- Elements:
 - (1) maintain levels of activities we do well; master teacher concept rather than only miscellaneous classes; IFCC to take greater initiative in setting class programs;
 - (2) enhancement of young audience programs;
 - (3) coordinate between gallery and theatre to a greater extent; and
 - (4) second season of professionally produced programs.
- What did this mean?*
- series
 - Cross-fertilization
 - Diverse and stable funding partners

- Peggy
- Enough administrative support for Sue & Judy
 - Utilize lower lobby for exhibition on various cultures
 - Consider contemporary culture
- T.J.
- 5 FTE - increase staff
 - Annex building operation
 - Expand to meet potential audience/public profile
 - Annual major events/high focus reputation
 - National profile for programming
 - Stronger financial base
- Pete
- Financially stable
 - Educational program with IFCC-generated curriculum
 - Staff support
 - Sponsor a major event each year
 - Library/research
 - Continue relationship with City
- Sheryl
- HOUSEHOLD NAME/BROADER RECOGNITION
- Roberta
- Build collection through purchasing work
- What is V.A.?
- Pay actors at better rate
 - Better marketing for VA (ie, pay for announcement)
 - Postcards of artist work
 - Facility improvement
 - Maintain open exhibition policy
 - Try to assure balance in media/ethnic/gender representation
- Judy
- Reputation for consistent level of production
 - Greater balance of art forms
 - Greater diversity and larger audiences
- Sue
- Sales and rental gallery for underrepresented artists which promotes concept of art ownership
 - Publish artists' work
 - International cultural exchange
 - Annex (capital campaign)
 - Community award event for the arts - ethnic or underrepresented, right?
 - 10th Anniversary event

BOARD COMMITTEES

Finance

Budget format; building 1991-1992; monthly management; cash flow monitoring system. Whether to establish board-designated cash reserve.

Governance (Nominating/Board Development) (Jeana)

By-laws and Articles of Incorporation; Relationship with City; Board Policy (by March) - rotation, terms, nominating Board recruitment policies, Board members, orientation packet (Sue), job description

Fundraising (Geneva Jones)

Set fundraising goal; supervise and develop with Staff annual Board fundraising plan (major donor, event-Board takes responsibility); timetable, strategies and responsibilities; current fundraising goal \$15,000; multi-year fundraising plan for advancement.

Public Relations and Marketing (T.J.)

Strategies for raising visibility of IFCC

Executive (Planning, Personnel, Board Committee Structure)

Resolve goals between the Board and Staff; Consolidate; Prioritize

IFCC RETREAT
Saturday, October 27, 1990

ROLE OF BOARD MEMBERS AND COMMITTEES

- I. Strengths of IFCC: WHAT IS WORKING
- A. Place people like to work: artists, performers, staff, Board, volunteers
 - B. Occupational diversity of the Board
 - C. Diversity and strength of Programming: Productions and Exhibits
 - D. Genuine interest and support for the artist
 - E. Staying power
 - F. Innocence/freshness of programs
 - G. Spillover into larger arts community (Sue's role in leadership)
 - H. Strength of leadership
 - I. Meeting diverse community needs
 - J. Resourcefulness
 - K. Provides and expresses a sense of pride
 - L. Educators - alternative for kids
 - M. Financial support and relationship
 - N. Talent of all involved
 - O. Mission: unique niche in the community
 - P. Provide opportunities for established/emerging
 - Q. Facility
 - R. Maintain artistic integrity
 - S. Volunteerism high
 - T. Valued staff
- What is this in reference to?*
- is there a word missing here? Is that word artists?*

WHAT IS NOT WORKING (OR COULD WORK BETTER)?

- I. Facility
- A. Physical appearance of outside (paint job) and functionality
 - B. Access to drive (lack of directional signage); need overspill parking marked by signage
 - C. Aesthetically inside (need to be non-smoking)
- II. Lack of Resources - need to increase private sector support (fundraising needs strengthening across the board)

- III. Public awareness and identity needs strengthening and marketing
- IV. Inadequate staffing to the task
- V. Needs to create an organized and regular volunteer base. Investigate partnership with groups such as, Junior League.
- VI. Need more business sophistication in areas, such as: financial, marketing, and fundraising.
- VII. Creating operating policies - artistic and personnel
- VIII. Need to strike and maintain balance between freshness of programs, while having systematic operations.

Sue	Executive Director	1	FTE
Judy	Producing Director	1	FTE
Roberta	Gallery	.125	FTE
Will	FM Coord. Aud. DULMT		contract
Debilyn	Mktg/writer 16 hrs/wk (64/mo)	.40	FTE
2 Custodians		1.15	FTE
Lam	Receptionist	.75	FTE

Artistic contract personnel (actors, directors, teachers)
Volunteers - roles: ushers
Need professional administrative support

IFCC's ideal relationship with the City would be to have status as a separate bureau.

Bogle Portfolio

fire department, public safety/911, IFCC

Lindberg

- MAC
- Liaison to Metro (PAC, Convention Center)
- Park Bureau (2 theatres)
community music center, dance company, IFCC
- IFCC (multi-cultural) \$57,000 + building + services

IFCC Retreat
Saturday, October 27, 1990
Page 3

BOARD ROLES AND STRATEGIES

GGG - give, get, ^{OR} get off
WWW - wealth, wisdom, work
\$ \$ \$

Staff: make job of Board member doable
Board: never make a commitment you honestly believe
you cannot keep

Never do a "benefit" for community visibility purposes

- A. Fun
- B. Planning and Policymaking
- C. Finance (conservative)
- D. Fundraising (sky is the limit)
 - Staff: 80-90% revenue-grants, public, corp., fdn.
 - Board: 10-15%
- E. Advocacy public sector contributions and community relations
- F. Personnel Policies (develop Ad Hoc)
- G. Attendance at IFCC (volunteerism)
 - line item in Revenue from Board Members' contributions
 - FR projects benefits for community visibility

HOW TO MAXIMIZE BENEFIT OF PARK PROXIMITY CONSTITUENCIES IFCC SERVES

Primary

Audiences, Board, Staff
Artist, Friends, School
Child, Ethnic Population

Secondary

Press, Funders, City Government,
Schools, Neighborhood, Ecumenical
Ministry-Oregon, A M Alliance

*Why are these
isolated
as constituencies?*

Current Audience Composition

Public	60% white, 25-45/50 years old, college education, theatre patrons, politically progressive, outside N/NE, <u>average income</u> .
Target	more diverse racial and ethnic mix in all audiences; broader theater audience; expand age reach (school - elders); seniors have needs to be met during day hours)

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IFCC Retreat
Saturday, October 27, 1990
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Programs At-A-Glance

	1991-92		1992-93		1993-94	
July	Board Social Summer Stage '91	Fundraiser IFCC	Board Social Summer Stage '92	Fundraiser IFCC	Board Social Summer Stage '93	Fundraiser IFCC
August	Boat Social Poetry Festival Black Rep Theatre	Fundraiser Rental Rental	Ethnic Dance Fest Boat Social Poetry Festival	IFCC Fundraiser Rental	Boat Social	Fundraiser
September	Young Actors Forum Kilbuck Concert	Rental Fundraiser	New Faces	IFCC	New Faces	IFCC
October	Accessible Theatre	Rental	Mainstage/ Student Matinee Birthday Party Juried Retro Exhibit Opening	IFCC Fundraiser Fundraiser	Student Matinee	IFCC
November	New Faces	IFCC			Mainstage	IFCC
December	Student Matinee Mara Stahl	IFCC Rental	Student Matinee New Faces	IFCC IFCC	New Faces Student Matinee	IFCC IFCC
January	Mainstage/ Student Matinee	IFCC	Mainstage/ Student Matinee	IFCC	Mainstage/ Student Matinee	IFCC
February			New Faces	IFCC	New Faces	IFCC
March	New Faces OR Dance Consort	IFCC Rental	Mainstage	IFCC	Mainstage	IFCC
April	NW Theatre Deaf	IFCC	NW Theatre Deaf	Rental	NW Theatre Deaf	Rental
May	New Faces	IFCC	Dance Concert Maya Angelou	IFCC Fundraiser	TBA	Fundraiser
June	Mainstage (PCPA) Passin' Art	IFCC Rental	Passin' Art	Rental	Passin' Art	Rental
	12 monthly Gallery Exhibits are scheduled		10 monthly Gallery Exhibits are scheduled		12 monthly Gallery Exhibits are scheduled	

MISSION STATEMENT

The Interstate Firehouse Cultural Center (IFCC), a community-based arts center, is committed to creating an environment in which people of every ethnic/cultural background come together as artists and audience to explore, preserve and celebrate their diversity.

STATEMENT OF PHILOSOPHY

As we take our first tentative steps away from the homogenized “melting pot” toward a society able to embrace the integrity and value of under-represented cultures, the arts must lead the way, preserving the richness of our diverse heritage, taking risks, confronting our growing pains, celebrating our overriding humanity and articulating a vision of what we can become.

That, in essence, expresses the artistic philosophy of the IFCC, and characterizes the unifying and driving force behind the programming we develop, the artists from diverse ethnic/cultural backgrounds who work here, and the equally diverse audience that comes to us for sustenance. Profound respect for cultural and individual integrity infuses everything we do.

Demonstrating our appreciation of both artists and audience, we are determined to compensate artists for their work while maintaining accessibility to the public. We are conscious of our place in the long-standing historical tradition of providing patronage for creative and performing artists. Our facility provides the necessary physical environment; our staff the necessary nurturing and guidance. This strong foundation enables our artists, at whatever stage of development, to speak responsibly and honorably, producing a profoundly provocative experience our audiences have come to expect.

Ultimately, everyone involved in IFCC activities, from our Board of Directors to our staff, our artists and our audience, shares the belief that the arts can and must go beyond mere decoration or entertainment. We are committed to an artistic process that encourages risk-taking and celebrates inclusion, fueled by an artistic philosophy that seeks to illuminate the universality of human experience through the unique perspectives of diverse cultures.

IFCC 3-YEAR PLAN

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SECTION IV	FINANCIAL MANAGEMENT
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SECTION VII	FACILITY
SECTION VIII	BUDGET
SECTION IX	BUDGET NARRATIVE

July 31, 1991

Advancement Program, NEA
1100 Pennsylvania Ave. NW Rm. 617
Washington, D.C. 20506

Dear Ms. Benson:

Here is progress report #3 for the IFCC:

- 1) Committees started work on the marketing, finance, and gallery sections during the month of March. Our consultant met with the Executive Committee of our Board to stimulate the juices, review the finances of the organization and comment on the plan.
- 2) In April the Governance Committee spent time with the City of Portland Park Bureau staff to dialogue about the future relationship between IFCC and City, and preparing for IFCC's move from Commissioner Bogle's office to Parks, official July 1, 1991.
- 3) By May most of the sections of the plan were ready for first draft typing. The budget continued to be a pain in the side as we examined the various components in relation to the whole. However, by the end of May we were working with a second revision and the light began to appear at the end of the tunnel.
- 4) At our June Board meeting the Executive Committee was very pleased to announce to the group that the plan was complete and our organization was still intact! Our Board President hastened to encourage everyone to take only a "quick" breath, as we are already in the process of executing the plan we have written. During the summer Board reorganization will continue so that active members will not be overwhelmed with burn out. Similarly, other summer fundraising, programming and organizational activities detailed for the summer are proceeding on track.

Our application for Advancement Phase two is in the works and will be with you shortly.

I remain,

Sue Busby
IFCC Executive Director

ADVANCEMENT '90

Sue Busby
Interstate Firehouse Cultural Center
5340 N. Interstate
Portland, Oregon 97217

July 5, 1991

Dear Sue:

Congratulations on being the ninth Advancement participant to complete the long range plan. You've done a good job here, especially under the trying circumstances your organization has had to cope with this year with unpredictable funding cuts!

Your plan is well written and has a good format -- I really like the look of your new computer! The programming, marketing and facilities sections are strong.

Most of my concerns center around how much increased income the organization can realistically raise and earn. You refer, in several places to becoming self-sufficient which is a goal that no not-for-profit arts group can aspire to -- you will still need outside support to survive. It seems that your challenge will be to replace dependence on government support with reliance on a diversity of community sources.

Below are some specific comments on individual sections of the plan. Both Juliana Grenzback and I have read and commented on the draft itself which is enclosed. Please remember these are the immediate responses of outside readers, and you should incorporate them or not as you see fit. The plan is yours, and you are under no obligation to change anything that you don't want to change.

Introductory background: This section is very good and your priorities make a lot of sense. I would include in here the amount and purpose of your Phase II Advancement request.

Programs: Well thought-out with good detail. It was easy to read and understand -- a rarity that is much appreciated.

Staff: An organizational chart with titles would be helpful.

Governance: It is not clear enough to the reader why you are spinning off from the city of Portland. Do you have a choice?

Fundraising: These goals seem overly ambitious. There seem to be a lot of special events. Do you have the people power to implement them?

Tel: (415) 331 0168
Fax: (415) 331 5865

Suite 101
1505 Bridgeway
Sausalito, CA 94965

Melanie Beene & Associates
A R T S C O N S U L T A N T S

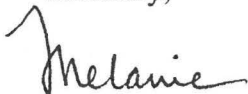
Facilities: The way this section and the marketing/visibility goals fit together is very nice. It's just unclear how it gets paid for and by whom?

Financial Management: Who will fulfill the bookkeeping functions? When you finally get the ToolBox that we are sending you, it should be of assistance in this area.

Budgets: Why a deficit this year? We need to be able to see, for each year, the beginning and ending fund balances. Some of the items in the building maintenance subcategory are traditionally carried under office expense or administration, for example: telephone, insurance, utilities. Why do you project individual donors declining? Good budget notes.

I'm really impressed with the job you did. With minor finetuning you have a very competitive plan. Let us know if you have any questions or we can assist you in any way.

Sincerely,

A handwritten signature in cursive script that reads "Melanie".

M. Melanie Beene

cc: Ellen Sollod



**INTERSTATE
FIREHOUSE
CULTURAL
CENTER**

IFCC
NEA PROGRESS REPORT
December 13, 1990

5340 N. Interstate Avenue
Portland, Oregon 97217
(503) 243-7930

1. Work plan is being implemented according to schedule. We met with our consultant, staff and board to clarify the task at hand and garner commitment. Committees begin to meet and a board retreat was held October 26, 1990. This proved very informative for everyone. The Governance and fundraising committees have met, but have been unable to set goals at this point. It is hopeful the December committee meeting will generate more concrete information. Strategies are being added this week to our draft-in-progress, with the help of our consultant, scheduled for a site visit December 14, 1990.
2. We have not encountered any problems which the Advancement Program Office should seek to correct. Our major problem has been with the City of Portland. Our computer purchase, would be cash advancement, was ordered but not delivered. So we are manually recording and changing our draft. We did get a copier through the City and that has helped a great deal.

The program design is working for us. The IFCC staff feels the Advancement Office, and consultants are and have provided great support.
3. We have not used outside resources to date. We are going to be working with a specialist in Marketing in January 1991.

Executive Director--December 13, 1990

Board Chair--December 13, 1990

Showing Portland's diverse cultural communities through the arts.
Commissioner in Charge, Dick Bogle

INTERSTATE FIREHOUSE CULTURAL CENTER



**5340 N. Interstate Avenue
Portland, Oregon 97217
(503) 823-2000**

INTERSTATE FIREHOUSE CULTURAL CENTER



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IFCC 3-YEAR PLAN

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Throughout this Plan, the category of strategies will use the following format: event, responsibility, time.

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IFCC PROJECT NARRATIVE

Background

Nine years ago, the need emerged for an arts center that would bridge the gap between the diverse, multi-cultural society we claim to be and the cultural inequities that have, in fact, been entrenched in our Euro-dominated system since its inception. The requirements were modest: a facility where under-represented visual and performing artists from a variety of ethnic/cultural backgrounds could pursue their work, develop their skills and share their unique visions. Community leaders, artists and government joined forces in a singular collaborative relationship to address this need for a cross-cultural arts center. The result: The Interstate Firehouse Cultural Center (IFCC), housed in a historical landmark fire station and renovated to include a 110-seat theatre, a visual arts gallery, a dance studio, office and public space.

The people who created the IFCC had no blueprint to follow. They were among the first to grapple with the tremendous challenges and possibilities inherent in serving such a broad range of cultures as well as artistic disciplines. The original management structure of the IFCC was as unique as the original mission, reflecting a rare combination of city and community cooperation and sharing of resources. In addition to providing the facility, the City of Portland assigned a commissioner to oversee the operation, assumed responsibility for the staff position of Executive Director, and managed all IFCC finances. Concurrently, the IFCC formed an advisory board and incorporated as a not-for-profit 501(c)(3) organization capable of raising funds to support contract labor and programming expenses.

From the beginning, something was happening at the IFCC almost every day of the year—productions, gallery exhibitions, educational services and community rentals kept the skeleton staff hopping. That explosion of activity, frequently arising out of ideas and projects proposed by members of the local arts community, has yet to slow down, confirming the validity of the deep-seated belief that fueled the creation of the IFCC: Given opportunity and a supportive environment, visual and performing arts reflecting a range of ethnic/cultural perspectives will flourish. IFCC is considered a valuable regional resource for access to culturally diverse artists and programs. We have gained a reputation for exciting, innovative programming and for respecting the integrity of artists. We have attained a promising level of visibility within the community and have received numerous awards in recognition of our ground-breaking efforts to increase public awareness of diversity through the arts.

The Present and Future

This current year marks a time of significant transition for the IFCC, particularly in the areas of governance and financial management. Having functioned as a city-run organization with minimal Board input, the IFCC is now in the process of evolving into an independently managed, self-sustaining organization with a full working Board of Directors leading the way. A negotiated relationship with the City will be maintained, but Board and staff are assuming greatly increased responsibility and control of the IFCC's future.

The combination of impending independence and participation in the Advancement program has propelled us to examine all aspects of our operation with care and honesty. Throughout the process we have remained confident of our purpose as an organization and the

areas of programming that best reflect that purpose. The real revelations have been the result of the intense interaction and attention to communication that the process demands, the detailed analysis of management systems and policies (or lack thereof), and the challenge inherent in determining priorities and becoming realistic about our dreams in relation to available resources. We have gained specificity and clarity, but most importantly, we have reached an unprecedented level of cooperation and shared purpose between Board and staff.

A great deal of time and energy has gone into examining a refinement of the current areas of IFCC programming:

1. A cross-cultural theatre season combining established and new work on ethnic/cultural themes. **MAINSTAGE SEASON.**
2. A series of matinees for young audiences. **STUDENT SERIES.**
3. Evenings featuring the reading of a new script, audience/playwright discussion, and a reception with culturally appropriate food and music. **NEW FACES.**
4. Monthly visual art exhibitions (predominantly local artists with an occasional national touring exhibition). **GALLERY EXHIBITS.**
5. A summer production camp for "youth at risk" offered in collaboration with Self Enhancement, Inc., an organization designed to expose young people to options and alternatives. **SUMMERSTAGE.**
6. A collaborative producing relationship with NW Theatre of the Deaf. **NWTD RESIDENCY.**
7. Classes taught by independent instructors. **CLASSES.**
- 8a. Performance space rental to independent companies and performers. **RENTAL.**
- 8b. Rental of facility for community use. **RENTAL.**

The above areas of programming will be continued over the next three years with increased attention to the following considerations:

- Emphasis on maintaining quality and consistency of production values.
 - Balancing theatre production with inclusion of other performing arts disciplines in the schedule.
 - Adjusting the amount of internally produced programming to allow staff to address other priorities.
- | | |
|-------|--|
| 91-92 | Reduce internally produced programming to allow staff to focus on administrative issues and preparation for 10th anniversary season. |
| 92-93 | Maximize programming in celebration of 10th anniversary with a "Best of the IFCC" season and other special events. |
| 93-94 | Arrive at a comfortable level of programming that balances produced/presented activity with rental activity and features a range of performing arts disciplines. |
- Examining realistic ways to expand educational services.

The planning process has clarified the management areas that require serious attention and action in the immediate future:

- Actively incorporating the Board into IFCC management and operations, particularly in the areas of planning, establishment of policies and fund-raising.
- Formalizing the IFCC/City relationship in order to establish effective internal management systems and clarify responsibilities.
- Assuming internal control of all financial management, fiscal planning and responsibility for the financial solvency of the IFCC in order to plan realistically and budget accordingly, and deal effectively with cash flow.
- Developing new sources of funding, particularly working to attract individual donors and regional corporations and foundations. Additionally, developing an annual fund-raising event so that donations are not the only source of unearned income.
- Addressing the pressing need for additional personnel to accomplish the goals outlined in the plan, upgrading both staff salaries, benefits and contract labor fees, establishing personnel policies and division of responsibilities.
- Serving the public as well and as thoroughly as we currently serve our artists. Increasing patron usage of IFCC by creating a new look, improving the facility cosmetically to provide a more inviting atmosphere, and focusing and increasing our marketing activities.

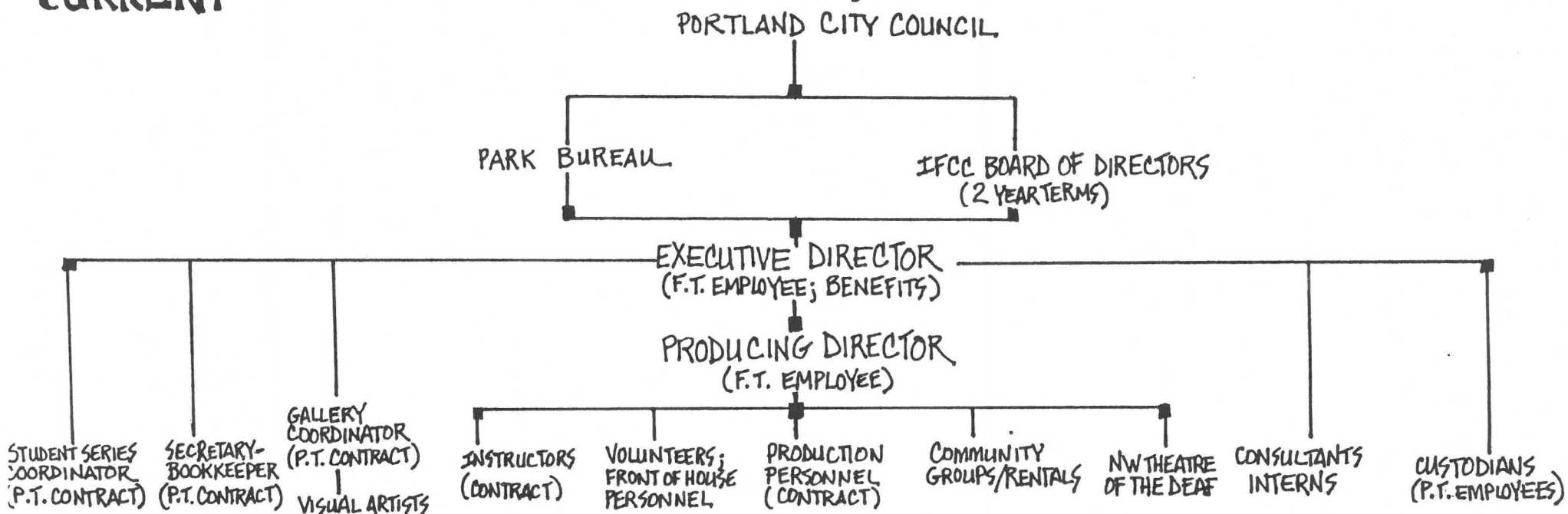
Growth over the next three years will not be evidenced by increased programming activity or any significant change in the type of programming we do. Rather, growth will be measured by our ability to maintain organization of all management systems, increase public support of our efforts in terms of both funding and patronage, and development of a strong staff and Board to lead the IFCC in the future.

Programs At-A-Glance

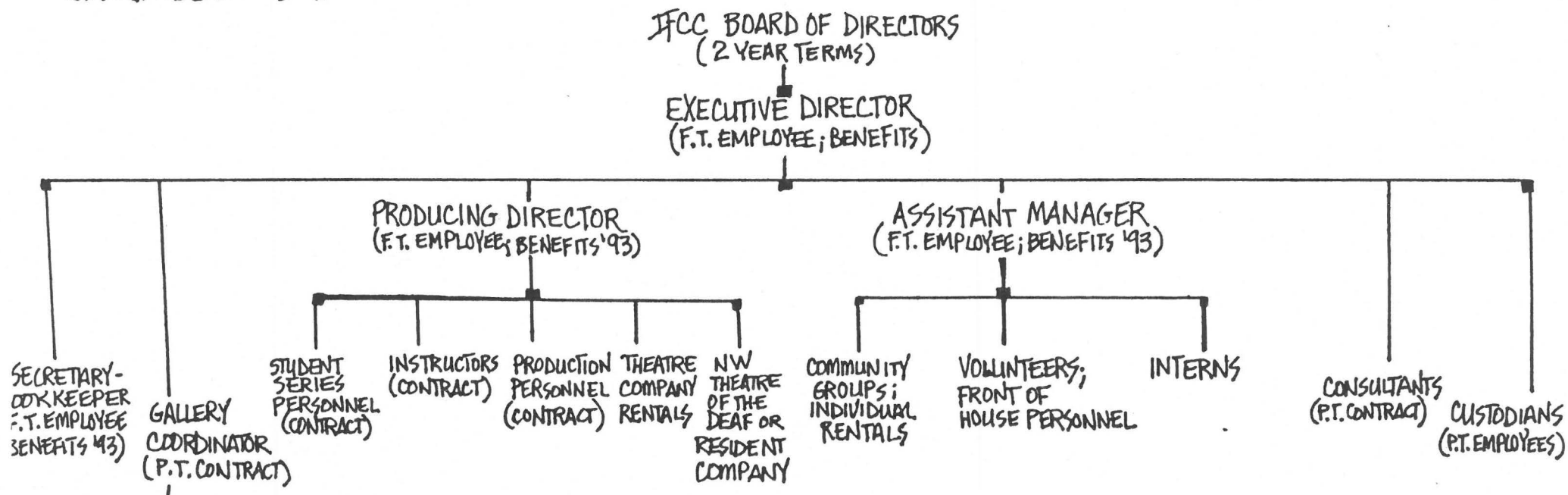
	1991-92		1992-93		1993-94	
July	Board Social Summer Stage '91	Fundraiser IFCC	Board Social Summer Stage '92	Fundraiser IFCC	Board Social Summer Stage '93	Fundraiser IFCC
August	Boat Social Poetry Festival Black Rep Theatre	Fundraiser Rental Rental	Ethnic Dance Fest Boat Social Poetry Festival	IFCC Fundraiser Rental	Boat Social	Fundraiser
September	Young Actors Forum Kilbuck Concert	Rental Fundraiser	New Faces	IFCC	New Faces	IFCC
October	Accessible Theatre	Rental	Mainstage/ Student Matinee Birthday Party Juried Retro Exhibit Opening	IFCC Fundraiser Fundraiser	Student Matinee	IFCC
November	New Faces	IFCC			Mainstage	IFCC
December	Student Matinee Mara Stahl	IFCC Rental	Student Matinee New Faces	IFCC IFCC	New Faces Student Matinee	IFCC IFCC
January	Mainstage/ Student Matinee	IFCC	Mainstage/ Student Matinee	IFCC	Mainstage/ Student Matinee	IFCC
February			New Faces	IFCC	New Faces	IFCC
March	New Faces OR Dance Consort	IFCC Rental	Mainstage	IFCC	Mainstage	IFCC
April	NW Theatre Deaf	IFCC	NW Theatre Deaf	Rental	NW Theatre Deaf	Rental
May	New Faces	IFCC	Dance Concert Maya Angelou	IFCC Fundraiser	TBA	Fundraiser
June	Mainstage (PCPA) Passin' Art	IFCC Rental	Passin' Art	Rental	Passin' Art	Rental
	12 monthly Gallery Exhibits are scheduled		10 monthly Gallery Exhibits are scheduled		12 monthly Gallery Exhibits are scheduled	

CURRENT

IFCC ORGANIZATIONAL/PERSONNEL CHART



JAN. 1992 - 94



IFCC 3-YEAR PLAN

I. PROGRAMS

A. **Producing/Presenting.** Live theatre currently represents the most important component of IFCC programming, offering the greatest potential to reach the widest possible audience, public attention and support, and the opportunity to work with the greatest number of artists.

1. **Goal:** To explore diverse ethnic/cultural traditions and perspectives through the performing arts.

a. **Objective:** Annually, to produce a mainstage theatre season reflecting a variety of ethnic playwrights and/or culturally-related experiences and issues.

Note: Minimize 91/92 producing season for financial stability and ensure adequate staff time for preparation of 10th anniversary season. ■ FY 1991-92.

- 1991-92
- (1) Produce *A Soldier's Play* by Charles Fuller ■ Producing Director ■ See Education ■ Jan. 1992.
 - (2) Produce a collaborative production with NW Theatre of the Deaf ■ Producing Director/NWTD ■ Final year for inclusion of NWTD in Mainstage Season. Identify benefits of existing relationship and assist NWTD in achieving self-sufficiency. ■ April 1992.
 - (3) Produce *The Immigrant* by Mark Harelik ■ Producing Director ■ Collaboration with Jewish community celebration. ■ June 1992.
 - (4) Increase contact with similar theatres in region to gain access to successful scripts on ethnic/cultural themes for inclusion in future seasons ■ Producing Director ■ Ongoing.

Note: Utilize 10th anniversary to produce a season of revivals: "Best of the IFCC." ■ FY 1992-93.

- 1992-93
- (5) Produce a "best of" revival, TBA (focus: Hispanic or Asian) ■ Producing Director ■ Oct. - Nov. 1992.
 - (6) Produce *The Colored Museum* by George Wolfe ■ Producing Director ■ Continue to use appropriate mainstage shows for Student Series. See Education ■ Jan. - Feb. 1993.
 - (7) Produce *Children of a Lesser God* by Mark Medoff ■ Producing Director ■ See Education ■ March 19 - April 18, 1993.

— Programs Cont'd —

Note: In 1993-94 continue mainstage theatre season with emphasis on a mix of cultures and a mix of new and established scripts. ■ FY 1993-94.

- 1993-94
- (8) Produce *Roosters* by Milcha Sanchez-Scott ■ Producing Director ■ Nov. 5 - Dec. 5, 1993.
 - (9) Produce either *The Piano Lesson* by August Wilson or new script by George Wolfe, pending availability of rights ■ Producing Director ■ See Education ■ Jan. 26 - Feb. 27, 1994.
 - (10) Produce the Oregon premiere of a new script by a prominent regional writer (focus: preferably Native American or Middle Eastern) ■ Producing Director ■ Script identified through contact with other regional theatres with similar mission ■ April 15 - May 8, 1994.

b. **Objective:** To expand presenting activities to include music and dance by 1992.

Note: In planning season schedules, include space for presenting music and dance beginning FY 92. ■ FY 1991-94.

- 1991-92
- (1) Plan outdoor festival of ethnic dance, music and food to kick off 10th anniversary season (develop format, contract artists, etc.) ■ Producing and Executive Directors ■ Nov. 1991 - Aug. 1992.
 - (2) Commission dancer/choreographer Mary Easter to create a new work to be performed as part of 10th anniversary season ■ Producing Director ■ Dec. 1991, initiate planning for May 1993 performance.

Note: Utilize 10th anniversary to present music and dance performances. ■ FY 1992-93.

- 1992-93
- (3) Present outdoor festival of ethnic dance, music and food ■ Producing Director/Executive Director ■ Combine with final day of SUMMERSTAGE '92 ■ Aug. 8, 1992.
 - (4) Present Mary Easter concert in collaboration with Oregon Dance Consort. ■ Producing Director ■ May 1993.

To grow artistically a theatre must commit to taking risks on new material. The IFCC will remain active in the nurturing, development and presentation of new scripts.

2. **Goal:** To foster new work of the highest quality, reflecting an ethnic/cultural perspective.

a. **Objective:** To provide regular opportunities for the review, development and workshopping of new scripts.

— Programs Cont'd —

- 1991-94
- (1) Continue NEW FACES Reading Series. Readings of three new scripts by local or regional playwrights with audience feedback and reception featuring the music and food of the culture reflected in the script ■ Producing Director ■ Oct.-Nov. 1991; Jan. 1992.
 - (2) Continue NEW FACES Reading Series: 3 scripts ■ Producing Director ■ Oct.-Nov. 1992; Jan. 1993.
 - (3) Initiate regional competition for new scripts on ethnic/cultural themes, specifically for young audiences. Winner to be produced in 93/94 Student Series. ■ Producing Director ■ Fall: announce competition; Winter: read and evaluate submissions; Spring: select winner. ■ Sept. 1992 - April 1993.
 - (4) Continue NEW FACES Reading Series: 3 or 4 scripts ■ Producing Director ■ Oct.-Nov. 1993; Feb. 1994.
 - (5) Produce winner of regional playwright competition in Student Series ■ Producing Director ■ See Education ■ Oct.-Nov. 1993.
- b. **Objective:** To create opportunities for the new scripts generated at IFCC to be shared on a regional or national level.

- 1993-94
- (1) Develop library of scripts from original work generated as part of IFCC NEW FACES ■ Producing Director ■ Develop agreement with playwrights about allowing other theatres access to scripts for consideration. ■ FY 1993-94.
 - (2) Research and Development: Possibility of promoting IFCC nationally as a source of new scripts by ethnic playwrights ■ Producing Director ■ Begin Jan. 1994.
 - (3) Research and Development: Possibility of production exchange with a similar company in another part of the country ■ Executive and Producing Director ■ Begin 1993.

B. Education. If the arts are ever to be considered a familiar and necessary part of life, involvement as an artist or a patron must begin early and be nurtured regularly.

1991-94 1. **Goal:** To foster early and frequent participation in the arts with a special emphasis on involving people from under-represented cultures.

- a. **Objective:** To provide the regular opportunity for young people (grades K-12) to attend matinee productions and exhibits that reflect their interests and concerns in a professional theatre and gallery setting.

— Programs Cont'd —

- (1) Annually continue to offer series of two or three plays for young audiences, serving area schools with daytime matinees and support material ■ Producing Director/Student Series Coordinator ■ Overlap with Mainstage Season where appropriate ■ FY 1991-94.
- (2) Provide gallery tour for all students attending Matinee Series ■ Student Series Coordinator/Producing Director/Teachers ■ FY 1991-94.
- (3) Work with area teachers to develop support materials/activities and play guides for classroom use ■ Student Series Coordinator/Producing Director ■ FY 1991-94.
- (4) Annually provide opportunity for post-show discussions between actors and audience following each student matinee ■ Student Series Coordinator/Producing Director ■ FY 1991-94.

Note: Reduce number of productions in Student Series and consolidate with Mainstage Season in FY 1991-92.

- 1991-92
- (5) Present *Coyote Speaks*. Level: Elementary (focus: Native American Culture) ■ Producing Director ■ Dec. 1991.
 - (6) Offer mainstage production, *The Good Times are Killing Me*, as part of the Student Series ■ Producing Director ■ See Producing/Presenting ■ Jan. 1992.

Note: Return to three-show Student Series and support activities, offering two plays and one other performing art in FY 1992-93.

- 1992-93
- (7) Present ETH-NO-TEC Dance Troupe. Level: Elementary ■ Producing Director ■ Dec. 1992.
 - (8) Offer mainstage production, *The Colored Museum*, as part of the Student Series. Level: JHS/HS ■ Producing Director ■ See Producing/Presenting ■ Jan. 1993.
 - (9) Offer mainstage production, *Children of a Lesser God*, as part of Student Series. Level: HS (focus: deaf) ■ Producing Director ■ See Producing/Presenting ■ March-April 1993.

Note: Continue 3-show Student Series and support activities, offering two plays and one other performing art in FY 1993-94.

- 1993-94
- (10) Produce winner of regional playwright competition. Level: Upper Elem/JHS (focus: TBA). Producing Director ■ See Producing/Presenting ■ Oct. 1993.
 - (11) Present Music Group TBA. Level: Elementary (focus: TBA). ■ Producing Director ■ Dec. 1993.

- (12) Offer mainstage production, *The Piano Lesson*, or new George Wolfe script as part of Student Series. Level: HS (focus: Black issues) ■ Producing Director ■ Consistently schedule black productions in this time slot to tie in with Black History month and MLK Jr. birthday. ■ Jan.-Feb. 1994.

An active involvement in the arts can develop confidence, improve communication and group interaction abilities, and stimulate creative problem-solving. Arts training can provide a positive alternative for young people needing access to these valuable life skills.

- 1991-94
- b. **Objective:** To provide regular opportunities for young people to develop social and creative skills through participation in the arts.
- (1) Promote student involvement in classes offered independently by local artists at IFCC ■ Staff ■ See Community Access ■ 1991-94.
 - (2) Continue annual SUMMERSTAGE 5-week performing arts camp in collaboration with Self-Enhancement, Inc. ■ Executive Director/SS Staff ■ 100 young people from diverse ethnic and cultural backgrounds participate in classes and create an original production under guidance of professional artists who serve as mentors. ■ July-Aug. 1991-94.
 - (3) Research and Development: IFCC-sponsored class program ■ Producing Director ■ 1992-93.
 - (4) Implementation of IFCC sponsored class program ■ Producing Director ■ Contingent on restructuring of job responsibilities ■ 1993-94.
 - (5) Research and Development: Possible continuation of class and/or production opportunity during 1993-94 school year for select group of 15-20 SUMMERSTAGE participants seriously interested in pursuing theatre. ■ Possible basis for group to participate in production exchange. See Producing/Presenting ■ Producing Director ■ July-Aug. 1993.

The diverse programming of the IFCC frequently attracts people with little formal training in theatre but with a strong interest in becoming involved in productions which reflect their particular cultural background.

2. **Goal:** To educate emerging theatre artists through on-the-job training and production experience, promoting professional attitudes and high production standards.
- a. **Objective:** To expand the local pool of experienced theatre professionals to include ethnic/cultural artists, by regularly combining community, semi-professional and professional artists on productions.

- 1991-94
- (1) Design an apprentice program of training workshops in various areas of production followed by an actual production assignment working under a professional theatre artist in 1992-93 season ■ Producing Director ■ Contact designers to help develop workshops and define apprentice duties. 1991-92.
 - (2) Implement phase 1 of apprentice program by offering a series of training workshops in 5 key areas of production ■ Producing Director ■ Use designs and production personnel for upcoming season to teach workshops. ■ June 1992.
 - (3) Implement phase 2 of apprentice program; make production assignments for shows in 1992-93 season as appropriate ■ Producing Director ■ Create letter of agreement between mentor and apprentice detailing time commitment and duties. ■ Aug. 1992 (ongoing through 1992-93 season).
 - (4) Utilize professional artists from Mainstage Season to offer master classes in specific areas of expertise ■ Producing Director ■ FY 1992-94 (ongoing).
 - (5) Continue apprentice program and master classes. Refine program based on input from pilot year participants ■ Producing Director ■ FY 1993-94.

C. **Community Access.** IFCC Programming, whether internally or independently produced, has traditionally evolved in direct response to community input. Within the parameters of our mission, the IFCC will continue to encourage community involvement in the planning and development of future seasons, so that programming reflects a strong interactive relationship between the IFCC and the diverse communities we serve.

1. **Goal:** To remain open and responsive to projects and ideas emanating from the community.
 - a. **Objective:** To create regular opportunities for local community participation.
 - (1) Solicit proposals from the artistic and cultural communities for inclusion in Mainstage Season, NEW FACES Reading Series and Student Series ■ Producing Director ■ FY 1991-94.
 - b. **Objective:** To regularly retain space in the schedule for rental to independent theatre companies and performing artists whose work reflects the IFCC mission.
 - (1) Establish written policies for rental costs and available support services. Effective Jan. 92. ■ Producing Director/Executive Director. ■ July 1991.
- 1991-92
- (2) Rent space as follows: ■ Producing Director ■ 1991-92.
 - (a) Kpani Addy Dance Concert ■ July 1991.

- (b) Portland Black Repertory Theatre ■ Aug. - Sept. 1991.
- (c) Portland Poetry Festival ■ Aug. 1991.
- (d) Young Actors Forum ■ Original show created and performed by established group of young people from diverse cultural backgrounds. ■ Sept. 1991.
- (e) Portland Accessible Theatre ■ Original murder mystery performed by disabled actors. ■ Oct. 1991.
- (f) Storyteller/puppetmaker Mara Stahl ■ Annual solstice show celebrating legends from a wide variety of cultures ■ Dec. 1991.
- (g) Andrew Hill Concert ■ Music ■ Feb. 1992.
- (h) Oregon Dance Consort ■ Original dance/theatre piece exploring multi-cultural myths of creation. Staged and choreographed by Judith Catterall. ■ March 1992.
- (i) PASSIN' ART ■ Black theatre company ■ June 1992.

Note: Continue to retain space in 1992-93 season for rental to independent companies and artists, with awareness that 10th anniversary Producing/Presenting activities limit available of space.

- | | |
|---------|--|
| 1992-93 | <ul style="list-style-type: none">(3) Announce availability of space in 1992-93 season publicity and through direct contact with users and community ■ Schedule rentals ■ Producing Director ■ Jan. 1992.(4) Rent to independent companies and artists as schedule allows ■ Producing Director ■ 1992-93.(5) Seek renters for 1993-94 season with particular emphasis on reducing theatre rentals and increasing rentals of other performing arts disciplines and/or individuals ■ Producing Director ■ Announce availability of space in 1993-94 season. ■ Jan. 1993. |
| 1993-94 | <ul style="list-style-type: none">(6) Continue to rent to independent companies and performers with good balance of performing arts disciplines in Rental Series. ■ Producing Director ■ FY 1993-94. |

c. **Objective:** To maintain an in-depth collaborative relationship with one emerging company whose work reflects the IFCC mission.

- (1) Continue special collaboration with NW Theatre of the Deaf within framework of Mainstage Season by providing administrative services and production assistance ■ Producing Director ■ See Producing/Presenting ■ FY 1991-92.

- (2) Based on experience with NWTD, write a plan for similar relationship with another company ■ Producing Director/Executive Director ■ Spring 1992.
- (3) Collaborate with NW Theatre of the Deaf on *Children of a Lesser God* (Mainstage Season) ■ Producing Director ■ See Producing/Presenting ■ Spring 1992.
- (4) Negotiate a new relationship with NWTD, enabling them to produce independently ■ Executive Director/Producing Director ■ Jan. 1992.
- (5) Retain space in rental schedule for NWTD spring production ■ Producing Director ■ Spring 1993.
- (6) Based on guidelines developed from NWTD model, identify a new emerging company and initiate collaborative relationship for inclusion in 1994-95 season ■ Producing Director/Executive Director ■ Jan. 1994.

A full-scale IFCC sponsored class program is under consideration for implementation in FY 1993-94. Meanwhile, we do encourage instructors from the community to utilize the space for classes, strengthening our contact with a variety of cultural groups and broadening the range of culturally diverse arts activities available to the community.

d. **Objective:** To regularly retain space in the facility schedule for community-initiated classes that reflect the mission of the IFCC, taught by independent instructors.

- (1) Continue African Dance/Drumming. Initiate beginning ballet/creative movement. Initiate fundamental movement. ■ Producing Director ■ Remain open to new proposals from the community ■ FY 1991-92.
- (2) Continue existing classes pending instructor interest and availability ■ Producing Director ■ FY 1992-93.
- (3) Investigate Asian, Hispanic and Native American community resources and identify possible instructors ■ Producing Director ■ Fall 1992.
- (4) Schedule weekend workshops to assess level of interest in expanded class offerings ■ Producing Director ■ Winter 1993.
- (5) Expand community class offerings continuing to use independent instructors ■ Producing Director ■ FY 1993-94.

D. **Gallery.** Few opportunities exist for artists of under-represented groups to prepare themselves as well as their work for professional exhibits and presentations. The IFCC Gallery provides this opportunity for these artists.

1. **Goal:** To explore diverse ethnic/cultural traditions and perspectives through the visual arts.
 - a. **Objective:** To coordinate a monthly exhibit that reflects a variety of ethnic/cultural artists and/or communities.
 - (1) Feature 3 Black, 3 Latin, 1 Middle Eastern, 2 Native American, 1 Asian, 1 children's show. ■ Gallery Coordinator/20 artists ■ Already booked ■ FY 1991-92.
 - (2) Feature 3-month "retrospective exhibit" of IFCC artists from the past 10 years ■ 10-year anniversary event ■ Gallery Coordinator ■ Oct.-Dec. 1992.
 - (3) Feature Black historical exhibit ■ Gallery Coordinator ■ Possible national exhibit ■ Jan.-Feb. 1993.
 - (4) Feature 12 artists, including representation from Asian, Black, Hispanic, and Native American cultures ■ Gallery Coordinator ■ FY 1993-94.
 - b. **Objective:** To expose students to more visual art in a gallery setting.
 - (1) Schedule gallery tours in conjunction with student matinees ■ Student Series Coordinator/Assistant Manager/Teachers ■ Docents used for national exhibition. Many students attending these programs are students of color. ■ 1992-94.
 - (2) Provide contact between visual artists on exhibit in the gallery and SUMMERSTAGE students ■ Summers 1992-94.

There are few community opportunities for under-represented artists to prepare for professional/commercial exhibitions.

- c. **Objective:** Offer staff services and expertise that meet the needs of artists and community.
 - (1) Produce postcard announcement and news release for each exhibit ■ Gallery Coordinator ■ FY 1992-94.

— **Programs Cont'd** —

- (2) Coordinate targeted bulk mailing (250 pieces) and coordinate opening reception for each artist ■ Gallery Coordinator ■ FY 1991-94.
- (3) Provide technical assistance for hanging of each exhibit ■ Gallery Coordinator ■ FY 1991-94.
- (4) Provide referral/networking information relevant to individual artist and community ■ Gallery Coordinator ■ FY 1991-94.
- (5) Produce juried show for "retrospective exhibit" ■ Gallery Coordinator/Community jurors ■ 10-year anniversary event. Jurors to be from key art institutions. ■ Begin planning FY 1991-92; Exhibit Oct. - Dec. 1992.
- (6) Coordinate community tours to ethnic/cultural artists' studios ■ Gallery Coordinator ■ April 1993.
- (7) Implement tours (groups of 15) to studios of 4 local artists ■ Gallery Coordinator ■ Pilot project ■ June-July 1993.
- (8) Research feasibility of establishing a rental/sales gallery ■ IFCC Board/Community Committee ■ FY 1993-94.

IFCC 3-YEAR PLAN

II. MARKETING AND PUBLIC/COMMUNITY RELATIONS

The IFCC has spent the past nine years being process- and artist-oriented. Having developed a needed product (culture inclusion), we must inform the general community of its availability and direct our focus "outward" to patrons and supporters. *

1. **Goal:** To formalize the marketing plan and professionalize implementation.
 - a. **Objective:** To target key personnel who will be responsible for marketing development.
 - (1) Hire Assistant Manager with skills in box office, marketing, office management and computer ■ Board ■ Jan. 1992.
 - (2) Design marketing procedures ■ Assistant Manager ■ Jan. 1992.
 - (3) Have one Board position assigned to staff as advisor ■ Board ■ July 1991.
 - (4) Increase marketing budget for next fiscal years ■ Board ■ May 1991.
 - (5) Annually develop marketing plan ■ Assistant Manager ■ May 1992.
2. **Goal:** To assess audience profile and more effectively identify potential patrons.
 - a. **Objective:** Develop methods to track marketing efforts.
 - (1) Survey audiences for all events (IFCC and rentals) and develop a profile of attendance: which events; frequency and pattern of attendance; age group; ethnic/cultural group; source of information about events ■ Producing Director ■ July 1991 (ongoing).
 - (2) Annually evaluate effectiveness of marketing ■ Assistant Manager/Board ■ May of every year.

The IFCC is a multi-cultural and multi-discipline arts organization. With so much to offer to so many people, the serious challenge is to promote one image to the many sectors of the public for maximum usage result.

3. **Goal:** To ensure thorough public awareness of the IFCC via effective public relations strategies.
 - a. **Objective:** To regularly promote the IFCC to the media.

— **Marketing and Public/Community Relations Cont'd** —

- (1) Write and mail news releases for each event ■ Assistant Manager ■ 1991-94 (ongoing).
 - (2) Maintain contact list of newspaper, radio, TV, arts, community organizations, schools to specifically include ethnic/cultural media. ■ Assistant Manager ■ 1991-94 (ongoing).
 - (3) Maintain current contact person/department for each media listing ■ 1991-94 (ongoing).
 - (4) Promote preview articles and reviews for each event ■ Producing Director ■ 1991-94 (ongoing).
 - (5) Annually identify feature stories and schedule special promotions ■ Producing Director ■ 1991-94 (ongoing).
 - (6) Annually hold pre-season "Media Night" to include media, government and community representatives ■ Executive Director/Board ■ August of every year, 1992-94.
- b. **Objective:** To regularly promote the IFCC to corporate/foundation community.
- (1) Target key corporations for group sales and employee ticket subsidy program and assign Board member to nurture ■ Assistant Manager ■ 1992-94 (ongoing).
 - (2) Maintain regular mailings of press releases to key corporate and foundation personnel and schedule articles about IFCC in corporate newsletters ■ Assistant Manager ■ 1992-94 (ongoing).
 - (3) Invite key corporate/foundation representatives to Media Night ■ Executive Director ■ Aug. 1992-94.
 - (4) Give membership perks to corporate/foundation contributors to encourage attendance and use of the IFCC facility ■ Assistant Manager ■ See Marketing ■ 1992-94 (ongoing).
 - (5) Promote staff speakers to business clubs, service clubs and professional associations ■ Assistant Manager ■ 1992-94 (ongoing).

To encourage cross-cultural sharing, it is imperative that the IFCC remove barriers to public participation and create feelings of accessibility, physical and psychological, to all targeted populations.

- c. **Objective:** To ensure broad community access to ethnic/cultural communities.

- (1) Explore the development of a 15-member Community Access Committee (CAC) made up of representatives from a broad range of ethnic/cultural communities, designed to increase diverse participation in IFCC activities ■ Board Committee/Executive Director ■ Research and Development 1991-92.
- (2) Submit proposal articulating CAC purpose and structure, and addressing organizational and operating procedures, governance and recruitment ■ Board Committee/Executive Director ■ Spring 1992.
- (3) Pending Board approval, recruit representatives, establish CAC and set goals for 10th anniversary season ■ Board Committee/CAC Reps ■ Summer 1992.
- (4) Design generic multi-lingual poster and brochure promoting IFCC multi-cultural environment and its inviting accessibility for distribution to ethnic groceries, churches, social centers, schools using CAC network ■ Graphic Designer ■ Jan. 1992.

4. **Goal:** To create the image of an inviting and accessible environment.

a. **Objective:** Make external physical plant accessible.

- (1) Increase rear parking lot floodlights ■ City ■ See Facility ■ Oct. 1991.
- (2) Increase signage with directions for entering, parking, and address and logo ■ Graphic Designer ■ See Facility ■ Complete by July 1992.
- (3) Purchase new marquee ■ Graphic Designer ■ See Facility ■ Sept. 1992.
- (4) Redesign north side landscaping for ease of access to neighbors' parking lot ■ City ■ See Facility ■ Complete by July 1992.
- (5) Design and install mural promoting multi-culturalism for front panels of building ■ Artist ■ See Facility ■ June, 1992.
- (6) Hang exterior banners that announce music, dance, theatre, gallery, classes ■ Graphic Artist ■ See Facility ■ Nov. 1991, hire Graphic Artist; Spring 1992 - Install.

b. **Objective:** Make the interior of the physical plant more inviting.

- (1) Paint lobby with colors that match new "look" ■ Contractor ■ See Facility ■ Aug. 1992.
- (2) Increase lobby signage with directions to theatre, gallery, offices, dance studio, restrooms ■ Graphic Designer/Contractor ■ See Facility ■ Aug. 1992.

- (3) Design "current production wall" for photos ■ Graphic Designer/Contractor ■ See Facility ■ Aug. 1992.
- (4) Hang banners in lobby ■ Graphic Designer/Contractor ■ See Facility ■ Aug. 1992.
- (5) Create new "announcements" space ■ Graphic Designer/Contractor ■ See Facility ■ Aug. 1992.
- (6) Post and enforce "No Smoking" signs ■ Executive Director ■ July 1991.

5. **Goal:** To foster increased participation in all IFCC activities.

a. **Objective:** Strengthen internal mechanisms for greater market return.

- (1) Re-organize mailing list to include past two year users only ■ Staff ■ July 1991.
- (2) Computerize users list from reservation slips (name, address, phone and event info) ■ Staff ■ July-Aug. 1991.
- (3) Distribute flyers/posters to sectors of community relevant to content of event ■ Contractor ■ 1992-94 (ongoing).
- (4) Develop and execute group sales plan to strengthen audience base and involve ethnic/cultural communities ■ Assistant Manager ■ 1992-94 (ongoing).
- (5) Focus and streamline content of all printed publicity material ■ Producing Director/Assistant Manager ■ 1991-94 (ongoing).
- (6) Produce quarterly calendar for public distribution ■ Producing Director/Assistant Manager ■ 1991-94 (ongoing).
- (7) Establish and publicize specific box office hours, policies and procedures to ensure better customer service ■ Producing Director/Assistant Manager ■ 1991-94 (ongoing).

b. **Objective:** Provide incentives for all users in order to increase ticket sales.

- (1) Reduce ticket price for mainstage productions significantly to maximize full potential of IFCC market ■ Executive Director ■ 1991-92: \$8.00; 1992-93: \$9.00; 1993-94: \$10.00.
- (2) Design system of flexible voucher subscriptions and implement in 10th anniversary season ■ Producing Director/Assistant Manager ■ 1992-94 (ongoing).

- (3) Design a system of membership benefits for individual and corporate contributors to encourage attendance and use of IFCC facility ■ Staff/Board ■ Design 1991-92; implement 1992-93.
- (4) Promote IFCC participation in ticket discount opportunities: PDX TIX ½ price booth; Entertainment coupon book; Theatre Alliance membership; and Student Artscard ■ Producing Director/Assistant Manager ■ 1991-94 (ongoing).
- (5) Reward voucher holders with invitations to gallery openings and discounts on other IFCC events and rental productions ■ Assistant Manager ■ 1992-94 (ongoing).
- (6) Explore other incentives to encourage casual IFCC users to become regular patrons ■ Assistant Manager ■ 1992-94 (ongoing).
- (7) Develop and promote a "family special" for two public performances of each Student Series production not included in the Mainstage Season ■ Assistant Manager ■ 1992-94 (ongoing).

Note: While ticket income will never cover the full cost of production, increased patronage will improve the stability of the IFCC and help create a healthier balance between earned and unearned income. Until maximum patronage is achieved, an increase in numbers rather than ticket price will make the difference.

- c. **Objective:** To annually realize an increased percentage of the IFCC operating budget through earned income while maintaining market accessibility: Earned income to = 20% of operating budget in 1991-92; 25% in 1992-93; and 40% in 1993-94.
 - (1) Analyze IFCC's unique constituency and set ticket prices for all productions and events to encourage increased attendance ■ Executive Director ■ See Budget Narrative ■ 1991-94 (ongoing).
 - (2) Use new staff position (Asst. Mgr.), expanded community contacts and increased marketing dollars to pursue strategies designed to improve advance ticket sales: annual phone-a-thon for vouchers; direct mail to targeted lists; group sales; Board solicitation; daily push to all users of facility; direct phone follow-up, thanking patrons for recent support and promoting next event ■ Assistant Manager/Volunteers ■ 1992-94 (ongoing).
 - (3) Increase community access income by establishing base rental charges for facility use (short and long term) and then contracting separately for additional services such as technical assistance, box office, and use of rehearsal space ■ Producing Director ■ 1991-94 (ongoing).

- (4) Analyze yearly rentals and use of production support services, update prices and plan facility marketing strategy ■ Producing Director ■ Annually in June, 1991-94.
 - (5) Develop flyer to promote availability of facility for rental and distribute to the community ■ Assistant Manager ■ 1992-94 (ongoing).
6. **Goal:** Enhance public awareness and stimulate increased usage of the IFCC by celebrating 10 years of service to the community.
- a. **Objective:** Stimulate community involvement with the creation of a steering committee to plan IFCC Birthday Celebration/10th Anniversary Kick-Off.
- (1) Invite Charles Jordan (Founder) to be honorary chair ■ Board ■ Jan. 1992.
 - (2) Select vice chair to actually appoint committee and implement planning ■ Board ■ Jan. 1992.
 - (3) Develop job description for committee ■ Board ■ Dec. 1991.
 - (4) Determine budget and timeline ■ Board ■ Dec. 1991.
- b. **Objective:** Utilize 10th anniversary to maximize public attention.
- (1) Organize raffle for drawing at Birthday Party ■ Committee ■ Feb. 1992.
 - (2) Throw birthday party to draw attention to IFCC, kick off a year of special events and unveil facility improvements and new look ■ Committee/Board/Staff ■ Fall 1992.
 - (3) Promote feature articles about history and future of IFCC ■ Executive Director ■ Begin Dec. 1991 (ongoing).
 - (4) Feature "Best of IFCC" in Mainstage Season ■ Producing Director ■ See Programs ■ 1992-93.
 - (5) Feature Retrospective Juried Art exhibit of previous IFCC artists ■ Gallery Coordinator ■ See Programs ■ Nov.-Dec. 1992.
 - (6) Present Ethnic Dance Festival in park and promote in neighborhood/Involve major sponsor for visibility ■ Executive Director/Board ■ Neighborhood "Thank you" See Programs ■ Aug. 1992.
 - (7) Present dance concert (Mary Easter) ■ Producing Director ■ See Programs ■ Spring 1992.
 - (8) Present Maya Angelou as fundraiser ■ Board/Staff ■ April 1993.

IFCC 3-YEAR PLAN

III. FUND-RAISING

The IFCC has been very effective in government and foundation fund-raising. It is now time to develop corporate, event and individual campaigns to achieve the balance for confident fiscal responsibility in the second decade of operation.

1. **Goal:** To raise a strong and diversified base of contributed financial support, with unearned income accounting for 60% of the IFCC operating budget by 1993-94.
 - a. **Objective:** Annually increase corporate contributions with particular emphasis on direct Board solicitation of potential new donors and staff nurturing of existing contributors.

Note: Use advancement match as incentive with the following targeted corporations in 1991-92.

- (1) Portland General Electric ■ Current contributor ■ Operations ■ Request \$5,000 ■ Board solicitation ■ Oct. 1991.
- (2) Nike ■ New contributor ■ Season support ■ Request \$5,000 ■ Board solicitation ■ Sept. 1991.
- (3) Old English Beer ■ New contributor ■ Request \$7,000 ■ Facility upgrade ■ Staff ■ July 1991.
- (4) Intel Corporation ■ Current contributor ■ Request \$2,500 ■ Summerstage ■ Staff ■ June 1991.
- (5) First Interstate Bank ■ Current contributor ■ Request \$2,500 ■ Summerstage ■ Staff ■ June 1991.
- (6) U.S. West Communications ■ New contributor ■ Request \$10,000 ■ Operations ■ Board solicitation ■ Nov. 1991.
- (7) Powell's Books ■ Current contributor ■ Request \$500 ■ Reading Series ■ Staff ■ Aug. 1991.

Note: Use incentives of Advancement match, 10th anniversary and membership benefits to negotiate with the following targeted sources, doubling corporate contributions in FY 1992-93.

- (8) Portland Trail Blazers ■ Current contributor ■ Request \$5,000 ■ 10th anniversary season ■ Executive Director.

— Fund-Raising Cont'd —

- (9) U.S. Bancorp ■ New contributor ■ Request \$5,000 ■ Production Assistance ■ Charles Jordan/Board solicitation.
- (10) PacifiCorp ■ New contributor ■ Request \$10,000 ■ Operations/Facility ■ Board solicitation.
- (11) U.S. West Communications ■ New contributor ■ Request \$10,000 ■ Student Series ■ Board solicitation.
- (12) Old English Beer ■ Current contributor/two-year commitment ■ Request \$7,000 ■ Facility upgrade ■ Staff.
- (13) Nike ■ New contributor ■ Request \$7,000 ■ Facility upgrade/Summer Stage ■ Board solicitation.
- (14) Portland General Electric ■ Current contributor ■ Request \$5,000 ■ Operations ■ Board solicitation.
- (15) Mervyn's ■ New contributor ■ Request \$2,500 ■ Student Series ■ Staff.
- (16) Continue relationship with Intel, First Interstate Bank and Powell's ■ Programming support ■ Staff.

Note: In FY 1993-94, retain a minimum of 50% of existing corporate donors, approach specific ethnic/cultural businesses as potential new donors, and target several regional corporations for new support.

- (17) Identify potential Asian, Black and Hispanic-owned corporations (three each) through CAC and Chamber of Commerce ■ New ■ Request \$3,000 from each ■ Board solicitation.
 - (18) AT&T ■ New/Regional ■ Request \$5,000 ■ Season support ■ Board solicitation.
 - (19) Microsoft Corporation ■ New/Regional ■ Request \$5,000 ■ Student Series ■ Staff.
 - (20) Oregon Lottery ■ New contributor ■ Request \$5,000 ■ Operations ■ Board solicitation.
- b. **Objective:** To annually increase the number and size of individual contributions.
- (1) Computerize history of giving and maintain up-to-date records on individual donors to maximize effectiveness of annual request for support ■ Assistant Manager ■ 1992-94.
 - (2) Personalize annual Board solicitation letter based on individual pattern of giving ■ Staff ■ Board ■ Spring 1991-94.

- (3) Annually increase number of Board solicitation letters mailed, by 20% ■ Board ■ Spring 1991-94.
- (4) Develop and implement memberships for IFCC donors, offering more extensive benefits for larger donations ■ Staff/Board ■ Design 1991-92; implement 1992-93.
- (5) Annually target and achieve 100% Board participation in individual giving, at the amount each is able to give ■ Executive Committee ■ 1991-94.
- (6) Use fund-raising events and programming to involve and attract potential individual donors ■ Board ■ 1991-94.
- (7) Bring in fund-raising expert for Board/Staff Workshop, focusing on development of individual donors ■ Board ■ Spring 1992.

Note: Government money is frequently one of the first stable sources of income for a not-for-profit arts organization. Certainly that has been true for the IFCC, but by all indications the party is about over for state (OAC), city (MAC), and city general funds. Government funds on all levels will rapidly diminish due to Measure 5, and we must find other means of support. Seeking matching funds for the advancement grant provides the perfect opportunity to generate replacement dollars from alternative sources of funding.

c. **Objective:** Reduce the amount of government money in the operating budget from 40% in FY 1991-92 to 20% by the completion of FY 1993-94, and pursue fund-raising strategies that stimulate alternative sources of contributed income.

- (1) Use advancement match as an incentive to generate new and greater donations from corporate/foundation and individual sources ■ Board/Staff ■ 1991-94.
- (2) Use reduction in City funding and move to independent status as an incentive to generate new and greater donations from corporate/foundation and individual sources.
- (3) Maintain NEA Expansion Arts funding and apply for Advancement funds.
- (4) Build on increased Board participation by developing annual fund-raising events to increase IFCC exposure and provide a new and consistent source of income ■ Board/Staff ■ 1991-94.
 - (a) 1991-92: Target \$6,500
Events: Two summer socials and one benefit concert
 - (b) 1992-93: Target \$25,000
Events: Two summer socials, IFCC birthday party complete with gallery opening and raffle, and presentation by Maya Angelou

- (c) 1993-94: Target \$15,000
Events: Two summer socials and one major event TBA.

Note: Though Portland cannot boast a huge number of well-endowed foundations, the IFCC has always maintained good relations with local foundations and has received consistent support from this quarter. As we look to the future, it must be acknowledged that the increasingly limited availability of government funding puts an even greater burden on already strained foundation resources.

d. **Objective:** To maintain current levels of foundation funding.

- (1) Work to sustain sizable multi-year funding from Meyer Charitable Trust ■ Staff/Board ■ Target stabilization of personnel during transition to self-governing status ■ 1991 request for FY 1992-95.
- (2) Maintain ongoing relationship with supportive local mid-size foundations: Templeton, Collins, Jackson, Oregon Community Foundation, Black United Fund ■ Staff ■ 1991-94 (ongoing).
- (3) Annually assign staff member or Board representative to research and pursue two new local or regional foundations as part of the fund-raising plan ■ Board Committee ■ 1991-92: Target Higgins and Rose E. Tucker; 1992-93: Target Murdoch and Autzen; 1993-94: Target two regional and two national foundations for development.

IFCC 3-YEAR PLAN

IV. FINANCIAL MANAGEMENT

Currently the IFCC is fiscally managed by the City of Portland. The Board has determined to assume this responsibility.

1. **Goal:** To be a fiscally independent and solvent organization by FY 1993-94.
 - a. **Objective:** To design and maintain in-house computerized financial management systems and record-keeping.
 - (1) Order annual audit for 1990-91 FY through City ■ Executive Director ■ July 1991 ■ Order future annual audits through an independent accounting firm ■ Executive Director ■ Each July 1992-94.
 - (2) Establish system for monthly cash flow monitoring and projections ■ Executive Director/Volunteer ■ In place, July 1991.
 - (3) Establish payroll system ■ Executive Director/Volunteer ■ Aug. 1991.
 - (4) Establish quarterly budget summary ■ Executive Director/Volunteer ■ In place, July 1991.
 - (5) Establish Board Finance Committee, chaired by Board Treasurer ■ Board ■ July 1991.
 - (6) Establish budget process and timetable for Board monitoring and approval ■ Board/Executive Committee ■ July 1991.
 - (7) Establish system for accounts payable monitoring ■ Board/Executive Director ■ July 1991.
 - (8) Establish Board-designated cash flow reserve and maintain in separate account (June 1992) ■ Replenish funds and increase reserve (June 1993 and 1994) ■ Achieve optimum reserve of \$25,000 (June 1994) ■ Board ■ 1992-94.

IFCC 3-YEAR PLAN

V. STAFF

1. **Goal:** To increase full-time staff for more effective use of current personnel with attention to assuring competitive salaries and humane working conditions.
 - a. **Objective:** To reassess existing staffing in light of the long-range plan and develop staff positions and policies appropriate to the implementation of the plan.
 - (1) Examine employee versus independent contractor issues and make appropriate adjustments for new fiscal year ■ Board/Executive Director ■ June 1991.
 - (2) Examine existing job descriptions and reassess compensation for each position so that contracts for the new fiscal year reflect accurate responsibilities and appropriate pay ■ Board ■ June 1991.
 - (3) Develop basic personnel policies for the organization ■ Board ■ July 1991.
 - (4) Determine responsibilities for new Assistant Manager position, prepare job description and begin recruitment ■ Executive Director ■ Sept. 1991.
 - (5) Fill Assistant Manager position ■ Executive Director ■ No later than 12-15-91, to begin work Jan. 1992.
 - (6) Explore possibility of acquiring health benefits for full-time employees not currently covered ■ If budgeted amount is sufficient, move to implement for FY 1992-93 ■ Executive Director/Accounting Volunteer ■ March 1992.
 - (7) Set up annual performance evaluation procedure for IFCC staff ■ Executive Director/Accounting Volunteer ■ April 1992.
 - (8) Evaluate new division of labor and responsibilities among three full-time employees ■ Board ■ April 1992.
 - (9) Rewrite job descriptions for all positions as needed and make appropriate adjustments prior to start of new fiscal year ■ Executive Director/Board ■ May 1992.
 - (10) Develop training plan for all full-time staff to augment skills in new areas of responsibility ■ Executive Director/Board ■ May 1992.

IFCC 3-YEAR PLAN

VI. GOVERNANCE

1. **Goal:** To transition the IFCC into an independent organizational structure no later than June 30, 1992.
 - a. **Objective:** To have a clearly defined Board structure and a full, working Board in place to meet the challenges of IFCC's changing governance status.
 - (1) Evaluate current Board strengths and weaknesses in terms of structure and membership ■ Board ■ July 1991.
 - (2) Establish Board Committee structure to meet needs of changing status ■ Board ■ Aug. 1991.
 - (3) Establish specific responsibilities and expectations for all Board members ■ Orient continuing and new Board members to new standards ■ Board ■ Aug. 1991.
 - (4) Fill Board vacancies to provide organizational support in the areas of accounting, law, fund-raising and public relations ■ Board ■ Sept. 1991.
 - (5) Annually budget monies for Board development to give Board members the opportunity to participate in training and conferences pertinent to governance and fund-raising responsibilities and implementation of the long-range plan ■ Board ■ Annually in March, 1992-94.
 - b. **Objective:** To have the IFCC By-Laws reflect the transition to self-governing status and the adoption of the long-range plan.
 - (1) Form Ad Hoc Board Committee to revise and update By-Laws to reflect the legal changes in IFCC status ■ Board ■ Jan. 1992.
 - (2) Present revised By-Laws to full Board for approval ■ Board Committee ■ March 1992.
 - (3) Complete negotiations with the City of Portland and define ongoing relationship: ownership of IFCC facility; responsibility for maintenance and insurance on same; shared services or programming; any other aspects of the relationship in need of reevaluation ■ Board ■ See Facility ■ 1991-92 (ongoing); complete no later than March 1992.
 - c. **Objective:** To enable the Board to assume the responsibility of providing for the long-range development and ongoing fiscal solvency of the IFCC.
 - (1) Establish basic policies and procedures for operational decision-making and authority, evaluation of programs and related staffing effectiveness ■ Board ■ Dec. 1991 - March 1992.

- (2) Set up and implement financial management policies and controls that allow the Board to evaluate the effectiveness of fund-raising strategies, operational systems, and utilization of resources and personnel ■ Executive Committee ■ Dec. 1991 - March 1992.
- (3) Oversee implementation of IFCC long-range plan in areas of operational growth and professionalization, policy development, resource development, fiscal management and fund-raising, personnel management and range of programs and services ■ Executive Committee/Board ■ 1991-94 (ongoing).
- (4) Annually reassess IFCC programming and services, management systems, personnel, and facility and equipment needs in light of fund-raising and resource development efforts, and develop budget for upcoming fiscal year accordingly ■ Executive Director/Board ■ March annually, 1992-94.
- (5) Based on annual assessment of IFCC operations, update all aspects of long-range plan to project three years beyond the current fiscal year ■ Staff/Board ■ March, annually 1992-94.

IFCC 3-YEAR PLAN

VII. FACILITY

Currently the IFCC building is provided by the City of Portland. A small portion of funding from the City helps with maintenance, but no formal agreement exists between the IFCC and the City concerning who is responsible for facility upkeep and improvement.

2. **Goal:** To clarify and formalize IFCC relationship with the City of Portland.
 - a. **Objective:** To have a formal, long-range agreement with the City regarding use of and responsibility for the IFCC facility.
 - (1) Continue talks with Park Bureau and City attorneys ■ Board/Executive Director/City ■ June-July 1991.
 - (2) Determine maintenance and improvement objectives for FY 1991-92 ■ Board/Executive Director/City ■ June 1991.
 - (3) Determine who is responsible for achieving facility objectives ■ Board/Executive Director/City ■ Aug. 1991.
 - (4) Establish formal lease agreement ■ Board/Executive Director/City ■ June 1992.
 - (5) Determine insurance responsibilities ■ Board/City ■ June 1992.
3. **Goal:** To ensure safety and ease of operation within the IFCC physical space.
 - a. **Objective:** To institute and maintain an inventory of working space and equipment to determine facility needs and priorities.
 - (1) Set up inventory/facility checklist ■ Producing Director/Intern ■ July 1991.
 - (2) Conduct inventory and facility assessment ■ Producing Director/Intern ■ Aug. and Dec., annually 1991-94.
 - (3) Solicit cost estimates, prioritize needs and develop a schedule for facility upgrading and repairs and equipment purchase to be completed prior to FY 1992-93 (10th anniversary) ■ Executive Director ■ Sept. 1991.

— Facility Cont'd —

Note: Address the following in plan for facility improvement: design and purchase of new marquee; design of decorative exterior mural, signage and banners and execution of same; redecoration of lobby and stairwell; renovation of parking lot with particular attention to accessibility and visibility; repair of leaks in roof; refinishing floor in dance studio; and improvement in signage and information display areas in all public space.

- (4) Do annual maintenance of theatre (repair stage floor, paint seating platforms, clean and organize booth and backstage areas) in preparation for new season ■ City/Custodian ■ July - Aug. 1991-94.
- (5) Do annual maintenance of studio, gallery, public and office space (clean carpet throughout facility, reorganize, clean, repair and paint as needed) in preparation for new season ■ Staff/Contractor ■ Aug./Sept. 1991-94.
- (6) Create accessible, organized storage system for office and box office records and maintain annually ■ Executive Director/Producing Director ■ Aug. 1991-94.
- (7) Acquire basic, all-purpose equipment to improve IFCC stock as needed. Producing Director/Executive Director ■ 1991-92 - podium, stools, music stands; 1992-93 - 20 padded folding chairs for front and back of theatre.
- (8) Do annual reorganization and cleaning of storage garages and prop and costume storage areas ■ Producing Director/Interns ■ July/Aug. 1991-94.

IFCC 3-YEAR PLAN

VIII. THREE-YEAR BUDGET PROJECTION

FY Begins July 1	89-90 Actual	90-91 Actual	91-92 Projected	10th Year 92-93 Projected	93-94 Projected
REVENUE/INCOME					
UNEARNED					
City	67,099	70,000	55,000	25,000	0
Govt. Grants					
NEA-Expansion Arts	5,000	5,000	10,000	10,000	10,000
NEA-Advancement	0	0	36,000	39,000	0
Smithsonian	600	0	0	0	0
Oregon Arts Comm.	8,400	6,531	6,500	4,500	4,000
Metro. Arts Comm.	2,878	16,054	4,000	3,500	3,000
Foundations					
Meyer Trust	41,000	11,000	15,000	25,000	25,000
Other	7,349	16,250	27,500	30,000	40,000
Business/Corps.	10,350	4,275	35,000	35,000	40,000
Fund-Raising Events	4,200	0	6,500	25,000	15,000
Contributions					
Individuals	150	8,983	2,500	1,200	1,200
Memberships	0	0	0	5,000	6,000
Other	0	8,367	1,633	0	0
SUBTOTAL UNEARNED	147,026	146,460	199,633	203,200	144,200
EARNED					
Special Projects	1,700	0	0	0	0
Ticket Sales					
Regular Season					
Season	400	943	0	3,000	3,750
Individual	28,370	21,567	25,020	49,005	53,790
Readings	0	328	792	1,155	1,238
Student	600	7,008	12,100	20,350	24,200
Rentals	9,000	4,154	5,000	2,500	5,500
Class Fees	1,800	0	0	0	3,500
Program Ads	0	50	0	3,000	3,000
SUBTOTAL EARNED	41,870	34,050	42,912	79,010	94,978
SUB EARNED/UNEARNED	188,896	180,510	242,545	282,210	239,178
IFCC TRUST PREV. FY BAL.	0	2,774	2,338	15,076	41,591
MEYER TRUST PREV. FY BAL.	37,000	36,000	0	0	0
TOTAL INCOME/REVENUE	225,896	219,284	244,883	297,286	280,769

— Three-Year Budget Projection Cont'd —

FY Begins July 1	89-90 Actual	90-91 Actual	91-92 Projected	10th Year 92-93 Projected	93-94 Projected
EXPENSES					
PERSONNEL					
Staff					
Exec. Director	30,000	30,534	34,100	35,800	37,600
Producing Director	15,100	18,400	25,000	26,250	27,500
Assistant Manager	6,700	0	10,000	21,000	22,100
Custodian	6,200	9,689	8,900	9,350	10,000
P/R Taxes (@ 15%)	4,500	3,109	11,600	13,900	14,600
Benefits	7,550	10,763	14,400	15,000	25,000
Secretary	0	3,357	500	15,000	15,000
Consultants/Bookkeeper	0	3,593	7,500	0	0
Subtotal Office Personnel	70,050	79,445	112,000	136,300	151,800
Productions					
Directors	4,000	9,626	2,000	6,000	5,000
Designers	6,000	14,707	5,000	7,000	6,600
Actors	7,600	19,508	10,000	15,500	12,000
Stage Managers	2,000	3,259	1,400	2,500	2,500
Consultant/Playwright	1,350	3,704	450	600	600
Technicians/Running Crew	3,000	4,715	1,800	4,000	4,000
House Mgr./Box Office	0	1,300	600	1,500	1,500
Subtotal Prod. Personnel	23,950	56,819	21,250	37,100	32,200
Educational Program					
Meyer Project Coord.	12,500	7,500	6,700	0	0
Instructors	1,950	0	0	0	5,500
Subtotal Educ. Personnel	14,450	7,500	6,700	0	5,500
SUBTOTAL PERSONNEL	108,450	143,764	139,950	173,400	189,500
PRODUCTION EXPENSES					
Printing/Promotion	5,000	5,741	6,400	4,500	4,500
Materials	1,500	9,107	5,000	9,000	7,500
Royalties	1,000	1,069	2,800	3,200	3,500
SUB. PROD. EXPENSES	7,500	15,917	14,200	16,700	15,500
GALLERY EXPENSES					
Gallery Coord.	2,300	2,750	5,100	3,800	4,100
Rentals	10,000	0	0	3,000	0
Printing/Promotion	500	0	900	1,095	1,000
Supplies	500	31	550	600	1,150
SUB. GALLERY EXPENSES	13,300	2,781	6,550	8,495	6,250

— Three-Year Budget Projection Cont'd —

FY Begins July 1	89-90 Actual	90-91 Actual	91-92 Projected	10th Year 92-93 Projected	93-94 Projected
EDUC. PROG. EXPENSES					
Printing/Promotion	100	0	0	0	1,000
Supplies	200	0	0	0	250
Symposia—Fall 1991	0	6,343	9,657	0	0
SUB. EDUC. EXPENSES	300	6,343	9,657	0	1,250
OFFICE EXPENSES					
Supplies	200	1,268	1,500	1,600	1,750
Equipment	3,200	1,495	350	0	0
Postage	7,500	223	5,000	5,500	6,000
Permits	400	195	500	500	500
Bank Charges	400	132	500	600	600
Printing	4,824	9,449	1,000	1,500	1,000
Mailing Labels	0	604	0	0	0
BUILDING MAINTENANCE					
Supplies	750	7,429	500	850	900
Utilities					
Telephone	5,000	2,796	3,500	3,800	4,000
Electricity/Heat	6,500	5,837	6,000	6,200	6,500
Water	300	0	400	450	500
Gas	400	0	450	500	550
Garbage	500	221	550	600	650
Facility Upgrade	7,748	2,833	16,500	17,000	2,000
Insurance	0	0	0	0	0
Garage/Storage	600	550	600	600	600
Contracts	0	1,710	1,800	1,900	2,000
SUB. OFC/BLDG. EXPENSES	38,322	34,742	42,550	41,600	27,550
FUND-RAISING					
Supplies	150	0	1,400	6,000	3,000
Printing/Promotion	500	0	1,000	3,000	2,000
Postage	100	0	1,000	2,000	1,000
Special Events	0	0	0	0	0
SUB. FUND-RAISING EXP.	750	0	3,400	11,000	6,000
STAFF DEVELOPMENT	3,000	822	3,000	4,000	5,000
BOARD DEVELOPMENT	0	77	500	500	500
CREDIT LINE PAYMENTS	0	0	10,000	0	0
OTHER	15,500	12,500	0	0	0
TOTAL ALL EXPENSES	187,122	216,946	229,807	255,695	251,550
NET INCOME/DEFICIT	38,774	2,338	15,076	41,591	29,219

IFCC 3-YEAR PLAN

IX. BUDGET NARRATIVE

Projected Revenue/Income

Unearned

City

These figures show a decline beginning 1991-92 as the City phases out its financial support. Negotiations will require Board participation. 1991-92 is confirmed. 1993-94 will retain in-kind services such as rent, insurance, etc., but receive no cash.

Govt. Grants

NEA-Expansion Arts Reflects programming and admin. Funds are committed for 1991-92. / Executive Director.

NEA-Advancement Figures reflect request for personnel, marketing/facility upgrade, and cash reserve.

Oregon Arts Comm. These figures decline, reflecting effects of Measure 5 on City and State funding sources. If effects are minimal, funding will remain at 1991-92 levels. / Executive Director.
Metro. Arts Comm.

Foundations

Meyer Trust 3-year grant ends 1991-92. Student Matinee Series becomes self-sustaining. Board will submit new proposal for 3-year funding of Executive Director position, to establish stability during City phase-out. This line also reflects NWTG 2-year grant for FY 89-90/90-91 (total \$20,000).

Other Board and Executive Director will increase campaign for local and regional support from foundations, to establish stability during City phase-out, using advancement match and 10th anniversary as incentive to funders.

Business/Corps. Board and Executive Director will increase campaign for corporate underwriting and sponsorship (i.e., fund-raising events, Mainstage Season, 10th Anniversary). \$10,000 reflects Meyers match. \$4,000 continued. \$20,000 new.

Fund-Raising Events

These figures show a net profit after expenses. This system of accounting will be adjusted to reflect gross figures in next budget revision. One large event will be developed per year.

— Budget Narrative Cont'd —

Contributions

Individuals

Campaign will be launched to convert individuals to membership. Board members will be asked to give according to ability, with the goal of 100% participation of all members (\$2,253/FY 91). Technical funds from M. Beene for Year #1 NEA planning (\$6,000). Will convert these donors to membership 1992-93.

Memberships

Plan will be developed 1991-92 and launched at beginning of 1992-93. / Board and Assistant Manager.

Other

Bank line of credit (\$10,000).

Earned

Special Projects

1989-90 figure reflects Smithsonian exhibit poster sales.

Ticket Sales

Regular Season

1991-92 = 2 shows/22 performances

2,502 (60% cap.) @ \$8 =	\$20,016
1,251 (30% cap.) @ \$4 =	<u>5,004</u>
	\$25,020

1992-93 = 3 shows/60 performances

4,950 (75% cap.) @ \$9 =	\$44,500
100 vouchers (400 tx) (6%) =	3,000
900 (15% cap.) @ \$4.50 =	<u>4,455</u>
	\$52,005

4,950 (75% cap.) @ \$10 =	\$49,500
125 vouchers (8%) @ \$30 =	3,750
858 ½ price (13%) @ \$5 =	<u>4,290</u>
	\$57,540

Readings

3 scripts @ 110 seats = 330 capacity

1991-92	198 (60%) @ \$4.00 =	\$ 792
1992-93	231 (70%) @ \$5.00 =	\$1,155
1993-94	248 (75%) @ \$5.00 =	\$1,238

Student Matinees

Public performances¹

1991-92	1 show/2 perf @ 110 seats = 220 @ \$5 = \$1,100
1992-93	1 show/2 perf @ 110 seats = 220 @ \$5 = \$1,100
1993-94	2 shows/4 perf @ 110 seats = 440 @ \$5 = \$2,200

Increase cost of matinee ticket

1991-92	2 shows/25 perf @ 110 seats = 2,750 @ \$4 = \$11,000
1992-93	3 shows/35 perf @ 110 seats = 3,850 @ \$5 = \$19,250
1993-94	3 shows/40 perf @ 110 seats = 4,400 @ \$5 = \$22,000

2

Rentals

1991-92 reflects high usage of new community groups such as accessible theatre consisting of impaired actors. 1992-93 reflects less usage for rentals and more IFCC programming.

Class Fees

Program ended in 1989-90 for re-evaluation. Scheduled to launch new Student Production component in 1993-94 per funding for staffing.

Program Ads

Will design generic season program

IFCC Trust

Housed by City; will phase out by 1992-93. Cash reserve account.

Meyer Trust

New grant pending after 1991-92. Encumbered funds for Student Matinee Series. Pass-through account for NWTB 1988-91.

Projected Expenses

Personnel Expenses

Staff

Executive Director reflects only full-time employee for past two years. Others have been on contractual basis and will be upgraded to employee status. Jan. 1992 reflects Assistant Manager position as full-time to include responsibilities of marketing, box office and Student Matinee Series. Secretary to answer phones and file, bookkeeping.

¹ Not offered as part of Mainstage Series.

² These figures total lines in budget.

— Budget Narrative Cont'd —

Productions	Reflects minimal activity in 1991-92 and an increase for 10th year anniversary. Average of 3 shows per year.
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Educational Program	Meyers Project Coordinator eliminated and responsibilities assumed by Assistant Manager beginning 1992-93. Instructor costs will resume in 1993-94, pending funding and feasibility
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Production Expenses

Printing/Promotion	1991-92 figures reflect season brochure, programs, flyers, PSA's and advance promotion for 10th anniversary
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Materials	Set, costume props, etc.
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Gallery Expenses

Coordinator	Part-time contractor for monthly exhibits plus one-time contractor for Retro Exhibit
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Rentals	1989-90 Smithsonian exhibit; 1992-93 national exhibit TBA. Part of Meyer's grant (\$6,000).
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Printing/Promotion	PSA, opening announcements
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Supplies	Lights, exhibit panels, flowers, podiums
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Educ. Program Expenses (Pending feasibility and funding in 1993-94)

Symposia	Open dialogue conference for artists of color. One-time event, in collaboration with Metro Arts Comm.
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Office Expenses

Supplies	Increases due to copier and computer
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Equipment	1989-90 Theatre sound booth upgrade
	1990-91 Copier
	1991-92 Computer program

Postage	1991-92 Decrease due to use of non-profit bulk rates rather than city discount rates and labor
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Printing	Will transfer needs to in-house computer system for layout and design.
----------	--

Building Maintenance

Supplies	1990-91 budgeted in city funds which will last into 1991-92. Resume purchasing supplies independently in 1992-93.
Utilities	Standard costs
Facility Upgrade	Gallery wall rebuilt; roof repaired, water repair in basement (1989-90). Major exterior and interior (paint, carpet, signage) upgrade for 10th anniversary (1991-93).
Insurance	Building owned and covered by City

Fund-Raising

Supplies	No events 1990-91.
Printing/Promotion	1991-92 Design generic brochure and poster and distribute
Postage	Invites, notices, flyers
Mailing Labels	Transfer to in-house function
Special Events	Costs to be netted out of proceeds; primarily to be underwritten by corporate sponsors

Staff Development

Conference travel, seminars, workshops

Board Development

Retreats, seminars to develop sensitivity, funding abilities

Other

NWTD Meyers Trust draws for 88-89/90-91. Project completed 1990-91.

Net Income

Operating surplus to be committed to Board-controlled cash reserves. To provide for cash flow and to be replaced by end of FY. Goal: To maintain \$25,000 by FY 1993-94.

PARTICIPANT'S
MANUAL

(202) 682-5436

ADVANCEMENT'90

A PROGRAM OF
THE NATIONAL ENDOWMENT FOR THE ARTS

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Managed by: **MELANIE BEENE AND ASSOCIATES**
1505 Bridgeway, Suite 101
Sausalito, California 94965

Phone: (415) 331-0168 Fax: (415) 331-5865

Melanie Beene

Juliana Grenzeback

NATIONAL ENDOWMENT FOR THE ARTS
1990/91 ADVANCEMENT PROGRAM

PARTICIPANT'S ORIENTATION

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Participant's Orientation Evaluation

NATIONAL
ENDOWMENT
FOR
THE ARTS

WASHINGTON
D.C. 20506



A Federal agency advised by the
National Council on the Arts

Welcome to Advancement! The selection of your organization for participation in this national program represents well-deserved recognition of your artistic achievement. The goal of Advancement is to extend and undergird that record of achievement through careful planning and further development of your capacity as an ongoing organization.

Two principles will guide our work together. First, while many hours will be devoted to the necessities of governance, management, marketing, fundraising, and finances, it is the artistic purpose and creative ambitions within your organization which will guide all efforts. A healthy balance sheet is without meaning if the creative impetus is sacrificed to the development of structures and systems. Secondly, while the 43 Advancement Participants share certain characteristics and face some common obstacles, there are no simple models which can be applied to all. It is best to view Advancement as a laboratory from which a variety of individually tailored solutions can emerge.

We are very pleased to be working with Melanie Beene and Associates. They have worked hard to create a program that responds to our goals. An exceptional team of consultants has been assembled to work with you, and their experience will be supplemented throughout the next year in a number of exciting ways. But, as with any technical assistance program, the benefit to your organization will depend largely on your commitment to take full advantage of these resources.

I wish you much success and look forward to a lively and productive working relationship.

Jeanne B. Hodges
Director
Challenge and Advancement Grant Programs

**NATIONAL ENDOWMENT FOR THE ARTS
ADVANCEMENT 90/91**

PARTICIPANT'S ORIENTATION

DAY 1 (Friday August 10, 1990, 9 a.m.- 5 p.m.)

At the J.W. Marriott Hotel

8 A.M. COFFEE SALON D

9:00 INTRODUCTION SALON D

Melanie Beene, Managing Consultant
Jeanne Hodges, Director, NEA Challenge/Advancement Program
Randy McAusland, Acting Deputy Chairman for Programs
A.B. Spellman, Director, NEA Expansions Arts Program
Lee Dennison, Assistant Director, NEA Challenge/Advancement Program
Janie Mutchler, Acting Program Specialist for Advancement
Susan Jarboe, Program Assistant for Advancement

10:00 WHAT YOU CAN EXPECT FROM ADVANCEMENT SALON D

24 consultant / 17 days or 12 hr per month with IFCC = long range planning document

-- Fifteen Minute Break --

11:00 WHAT ADVANCEMENT EXPECTS OF YOU SALON D

NOON LUNCH SALON E

**1:30 ARTISTIC DISCIPLINE BREAKOUT SESSIONS
(See attached list for room assignments)**

-Meet NEA Program Staff
-Discuss Common Issues in the Field
-Networking

3:00 -- Half Hour Break --

3:30 THE CLIENT/CONSULTANT RELATIONSHIP SALON D

Chair: Laurie MacDougall, Consultant
Panel: Advancement Consultants

**5:00 ADJOURN.
SOCIAL HOUR -- CASH BAR AVAILABLE**

DAY 2 (Saturday August 11, 1990, 9 a.m.- 5 p.m.)

At the J.W. Marriott Hotel

9:00

THREE BREAKOUT SESSIONS ON THE PLANNING PROCESS:

We recommend that each person from an organization attend a different session during each time slot.

1. The Role of the Artistic Director in the Planning Process **RUSSELL ROOM**
Ellen Sollod, Chair
Panel: Greg Kandel, Wendy Lesser, Bill Terry
2. The Role of The Board in the Planning Process **HART ROOM**
Jane Delgado, Chair
Panel: Halsey North, John McCann
3. The Plan and the Planning Process **CANNON ROOM**
Carol Yamamoto, Chairman
Panel: Nancy Legge, Morrie Warshawski

10:15

-- Fifteen Minute Break --

10:30

REPEAT OF ABOVE THREE SESSIONS

SAME ROOMS

Each Participant Should Attend a Different Session.

NOON

LUNCH

SALON E

1:30

BREAKOUT SESSIONS WITH YOUR CONSULTANT

(See attached list for consultant assignment and locations)

3:00

-- One Half-Hour Break --

3:30

WHAT ADVANCEMENT IS REALLY LIKE

SALON D

A panel of former Advancement Participants will discuss the day-to-day reality of participating in the program, answer questions, and give tips on how to survive.

Chair: Jane Delgado, Consultant

Panelists: Carolelinda Dickey, formerly with Foundation for Dance Promotion
Juliana Grenzeback, former Development Director, City Celebration
Ron Himes, St. Louis Black Repertory Company, Inc.
Johnny Irizarry, Executive Director, Taller Puertoriqueno, Inc.
June Wiley, Executive Director, San Francisco Girls Chorus

Final Questions and Answers.

5:00

ADJOURN.

DISCIPLINE BREAKOUT SESSIONS WITH NEA STAFF

DANCE -- RUSSELL ROOM

Moderator: Ellen Sollod
African-American Dance Ensemble
Colorado Dance Festival
Dance Bay Area
Dance Brigade

NEA Director: Sali Ann Kreigsman

Consultants: Greg Kandel, Laurie MacDougall, Patrice Powell, Bill Terry
Dance Cleveland
H.T. Dance Company
Muntu Dance Theatre
Omaha Ballet Society
Pittsburgh Dance Council
San Jose Taiko Group
Tandy Beal & Company
Zenon Dance Company and School, Inc.

FOLK ARTS -- HART ROOM

Moderator: Jane Delgado
Cityfolk
Coconino Center for the Arts

NEA Director: Bess Lomax Hawes

David Adler Cultural Center
Western Folklife Center
World Music Institute

INTER-DISCIPLINARY -- SALON D

Moderator: Halsey North
Chinese American Educational & Cultural Center
Hostos Culture & Arts Program

NEA Asst. Director, Expansion Arts: E'Vonne Coleman Rorie

Interstate Firehouse Cultural Center
Sealaska Heritage Foundation

LITERATURE -- SALON D

Moderator: Wendy Lesser
Calyx
Small Press Distribution, Inc.

NEA Acting Director: Michael McLaughlin

The Writer's Voice
Writers & Books

MEDIA ARTS -- SALON D

Moderator: Morrie Warshawski
Community Film Workshop of Chicago
National Asian American Telecommunications Assn.

NEA Director: Brian O'Doherty

Consultants: Nancy Raine, Cheryl Yuen
Pittsburgh Filmmakers
San Francisco Cinematheque

OPERA/MUSICAL THEATRE -- SUITE 1169

Moderator: Carol Yamamoto
Austin Lyric Opera

NEA Acting Director: Gertrude Saleh

Syracuse Opera

THEATRE -- SALON D

Moderator: John McCann
Allegheny Highlands Regional Theater

NEA Director: Jessica Andrews

Lime Kiln Arts
Jomandi Productions, Inc.

VISUAL ARTS -- CANNON ROOM

Moderator: John Wessel
Capp Street Project/AVT
Center for Exploratory & Perceptual Art
Center for Photography at Woodstock

NEA Director: Susan Lubowsky

Consultants: Laurel Jones, Nancy Legge
DiverseWorks
Houston Center for Photography
Pyramid Arts Center
Mexican Museum
Museum of Contemporary Hispanic Art
National Institute of Art & Disabilities

BREAKOUT SESSIONS WITH CONSULTANTS

ORGANIZATION	CONSULTANT	MEETING ROOM
Allegheny Highlands Regional Theater	North	CANNON
African-American Dance Theatre	Powell	SALON D
Austin Lyric Opera	Yamamoto	SALON D
Calyx	Lesser	SALON D
Capp Street Project	Legge	RUSSELL
Center for Exploratory & Perceptual Art	Wessel	SALON D
Center for Photography at Woodstock	Kandel	SALON D
Chinese American Education Center	Warshawski	SALON D
Cityfolk	Yamamoto	SALON D
Coconino Center for the Arts	Wagner/Beene	SUITE
Colorado Dance Festival	Sollod	SALON D
Community Film Workshop of Chicago	Yuen	SALON D
Dance Bay Area	MacDougall	HART
Dance Brigade	MacDougall	HART
Dance Cleveland	Warshawski	SALON D
David Adler Cultural Center	Yuen	SALON D
Diverseworks	Jone	SALON D
H.T. Dance Company	Terry	SALON D
Hostos Culture & Arts Program	North	CANNON
Houston Center for Photography	Jones	SALON D
Interstate Firehouse Cultural Center	Sollod	SALON D
Jomandi Productions	McCann	SALON D
Lime Kiln Arts	McCann	SALON D
Mexican Museum	MacDougall	HART
Muntu Dance Theatre	Terry	SALON D
Museum of Contemporary Hispanic Art	North	CANNON
National Institute of Art & Disabilities	Legge	RUSSELL
Natl. Asian American Telecommunications Assoc	Raine	SALON D
Omaha Ballet Society	Warshawski	SALON D
Pittsburgh Dance Council	Kandel	SALON D
Pittsburgh Filmmakers	North	CANNON
Pyramid Arts Center	Wessel	SALON D
San Francisco Cinematheque	Raine	SALON D
San Jose Taiko Group	MacDougall	HART
Sealaska Heritage Foundation	Legge	RUSSELL
Small Press Distribution, Inc.	Lesser	SALON D
Syracuse Opera	Yamamoto	SALON D
Tandy Beal & Company	MacDougall	HART
The Writer's Voice	Delgado	SALON D
Western Folklife Center	Wagner/Beene	SUITE
World Music Institute	Delgado	SALON D
Writers & Books	Wessel	SALON D
Zenon Dance Company	Terry	SALON D



INTERSTATE
FIREHOUSE
CULTURAL
CENTER

5340 N. Interstate
Portland, OR 97217
(503) 243-7930

August 30, 1990
To: Melanie Beene
From: Sue Busby, IFCC
Re: Special Needs Allowance

Allen faxed copy
to sign - she
mail hers, we
mailed ours
9-10-90
SB

Board of Directors

Sheryl M. Warren
President

Geneva Jones
Vice President

Carol Edmo
Recording Secretary

Kathryn Bogle
Corresponding
Secretary

Terman Grimes
Treasurer

Carol Jernigan
Edith Kilbuck
Terri Naito
Peter Vlahos
Jeana Wooley

Sue Busby
Executive Director

The IFCC would like to request \$6,000 from the Special Needs Allowance fund to purchase a computer system.

This has been discussed with our consultant Ellen Solloch and board president Sheryl Warren, and both agree this purchase is most necessary for the course of activity charted for next year. (Please note this letter is hand-drafted.) We cannot write a three year plan by hand. We have no secretary, copier, and only one fragile typewriter.

We appreciate your approval of the attached listing of specifications. We have placed an order through the City of Portland as of 8-29-90.

Showcasing
Portland's
diverse
cultural
communities
through
the arts.

Sue Busby
Sue Busby,
Executive Dir.

Sheryl M. Warren
Sheryl Warren
Board President

Ellen Solloch
Ellen Solloch,
Consultant

[illegible]



INTERSTATE
FIREHOUSE
CULTURAL
CENTER

5340 N. Interstate Avenue
Portland, Oregon 97217
(503) 243-7930

COMPUTER SPECIFICATIONS FOR IFCC

Pricing

Hardware and Software

MAC SE with 40 MB drive and 2MB RAM (extended keybd)
Excel for Mac
Pagemaker for MAC (latest version)
MS Word (latest version) for the MAC
Filemaker II for the MAC
Surge Protector (PTIS-85)
MAC Link Plus Translator
Estimate

1430
295
595
285
225
75
120
3025

Printer

NEC LC290 Postscript printer
with 2 phone-net connectors (FARPN208)
Envelope cassette
Estimate

2596.75
70
70

2736.75

Total Estimate:

\$ 5761.75

1990/91 ADVANCEMENT PROGRAM RATIONALE AND OBJECTIVES

Many arts organizations of national or regional artistic significance are in a critical stage of development. Typically, these organizations have developed and gained recognition through an intense commitment to a unique artistic vision. However, the functional structure for articulating this vision has not always developed at a comparable rate. Advancement exists to help these organizations develop and/or strengthen an organizational base that will best serve and support their artistic vision.

Thus, Advancement's prime objective is about art -- to enhance and nurture its quality and to enable as large and diverse an audience as possible to experience it directly. Toward this end, the program is designed to help the participating organization develop specific strategies to strengthen its organizational management practices and to take carefully planned steps toward the achievement of long-range goals.

In the Advancement Program, each participant organization is viewed as unique, and no single outcome is expected or encouraged. Rather, Advancement allows each participating organization the opportunity to examine various alternatives while providing access to tools and information to support their self-direction.

In Phase I, the participating organization will assess its immediate and long-term needs, set goals, and begin to address immediate organizational needs which have a direct bearing on the ability of the organization to achieve its goals. The organization will receive professional assistance in developing a long-range plan appropriate to its own identity, aims, and circumstances. This plan is the primary product of the Planning/Technical Assistance Phase.

In Phase II, the participating organization may apply for an Advancement Grant. In general, grant amounts will range from \$25,000 to \$75,000, with an average grant of \$50,000. This grant must be matched at least three to one during the grant period.

PARTICIPANT'S CALENDAR OF EVENTS

PHASE I -- PLANNING AND TECHNICAL ASSISTANCE **AUGUST 10, 1990 - AUGUST 16, 1991**

August 10-11, 1990

Participant's Orientation in Washington, D.C. Topics will include: orientation to Advancement; tailoring the planning process to your organization; the role of the Board in the planning process; the role of the Artistic Director in the planning process; and how to make the client/consultant relationship work.

September 5, 1990

Submit expense reimbursement requests for the Participant's Orientation to Melanie Beene & Associates.

September 30, 1990

Complete an Organizational Self-Assessment. Your Advancement Consultant will assist you in completing a self-assessment process so that you can establish a shared perspective on the organization's needs and strengths and prioritize your tasks for Phase I.

Submit Work Plan and Letter of Agreement to Melanie Beene & Associates by September 30. The work plan should describe the tasks to be completed in Phase I of the Advancement process, the individuals responsible for completing the tasks, and a timeline for completion. The letter of agreement between your organization and your Advancement Consultant should outline the parameters and expectations of each party during the Phase I planning process.

If possible, your work plan should include some indication of how you will use your \$6,000 Special Needs Allowance, and when you will request those funds.

October, 1990 through June 30, 1991

Develop a Long Range Plan for your organization in cooperation with your Advancement Consultant. The plan should outline your artistic, administrative and financial goals, and articulate measurable objectives and strategies to achieve these goals.

December 14, 1990

Submit Progress Report #1 to the NEA's Advancement Program office according to the instructions in Section 3 of this manual.

December 30, 1990

Submit your plan for the use of your \$6,000 Special Needs Allowance to Melanie Beene & Associates by this date. Also, indicate when you anticipate requesting the funds.

March 1, 1991

Submit Progress Report #2 to the NEA's Advancement Program office.

June 15, 1991

Submit Progress Report #3 to the NEA's Advancement Program office.

June 30, 1991

Submit Long Range Plan to Melanie Beene & Associates for review.

Request your Special Needs Allowance funds by this date, or the funds will be reallocated.

August 16, 1991

Submit Long Range Plan and Application for Advancement Grant Funds to the NEA Advancement Program. Include your organization's most recent audited financial statements. Send final copies of the long range plan and grant application to Melanie Beene & Associates and to your Advancement Consultant.

August 30, 1991

Submit Progress Report #4 to the NEA's Advancement Program office.

GLOSSARY OF ADVANCEMENT PROGRAM COMPONENTS

Managing Consultant - is the project director, also referred to as the cooperator. As Managing Consultant, Melanie Beene will provide the overall management and supervision of Phase I of the Advancement Program. She will be available to you and your consultant for advice, oversight, and special counsel. After consultation with you and your consultant she will be responsible for giving final approval to both your Work Plan and your plan for the expenditure of the \$6,000 Special Needs Allowance available in Phase I. She will also review and comment on the final draft of your long range plan. You should contact Melanie Beene if you have problems, comments, or concerns with the Program or with your consultant. She will be calling you on a regular basis to review the progress being made.

Program Administrator - Juliana Grenzeback will focus on the administrative and financial systems connected with the operation of Phase I of the Advancement Program. Contact Juliana if you have questions concerning reimbursement for your Orientation expenses and for payment of the Special Needs Allowance. A former Advancement participant, she can be a valuable resource for this year's participant organizations.

Field Consultants - are the contracted consultants who work directly with the participant organizations to provide on-site technical assistance. Also called Advancement consultants.

Participant Organizations - are the 43 groups currently participating in Phase I of Advancement and eligible to apply for Phase II funding on August 16, 1991. They are not called "grantees" because technically they have not yet received a grant. Each participant organization is budgeted to receive, on average, 24 consulting days which includes travel to the organization and off-site administration. This works out to approximately 18 days of direct consulting time per organization.

Target Technical Assistance Organizations - are 7 additional Advancement applicants who, though assessed as not ready to undertake the full Advancement Program, were given a limited number of consulting days for technical assistance targeted to meet the individual needs of the organization. Target groups do not receive a Special Needs Allowance, are not required to submit a long range plan, and are not eligible to apply for Phase II funding. They are eligible to reapply to the Advancement Program in a subsequent year, and several of this year's Participant Organizations were Target groups in prior years.

Special Needs Allowance - is also referred to as Participant Reimbursement. It is a \$6,000 per organization allocation for meeting special needs: additional technical consultants, training, or equipment. In prior years it was referred to as the Specialist Consultant Funds. For the first time this year, these funds can be used, where appropriate, to bring in outside consultation on the artistic product, as well. These funds can not be used for general operating support.

The consultant works with each individual Participant Organization to determine the most appropriate use of these funds. This is usually done after completing an organizational self-assessment. These funds can be requested at any time, but must be used before June 30, 1991 or they will be reallocated. Specific details on how to request these funds are included in this manual.

Technical Assistance Resource Directory - is a reference guide for Participant Organizations that provides a listing of available consultants, workshops and seminars, and a bibliography of publications in the management area of the arts. The aim of this directory is to be simple, helpful and available as soon as possible. Given these criteria it is not envisioned as scholarly or complete. Initially it will be compiled from recommendations from the Advancement Consultants.

Arts Manager's Tool Box - will be a book of samples, formats, templates, checklists and procedures for executing the management tasks necessary to run a nonprofit organization. The Tool Box is a formbook compilation of "tools of the trade" gathered from the Advancement consultant pool. The idea is to ultimately develop a chapter of generic forms for each functional area of management.

This complete project is beyond the scope of one year, but we hope to complete the following chapters: financial management, fundraising, and board development. These will be compiled and distributed to you during Phase I, as they become ready. The objective of this component is to have a practical, hands-on tool that saves time and prevents "reinventing the wheel" for organizations characterized by high staff turnover and lack of institutional memory.

Consultants' Seminar/Audience Outreach Report - In January 1991 the consultants will reconvene for an Audience Outreach Seminar devoted to exploring the topic: "Increasing the Attendance of Non-Traditional Audiences at Arts Events." The purpose of the Audience Outreach Seminar is to create a forum for the exchange of viewpoints on this issue. We will invite representatives from the local community to join our conversation as we attempt to unravel various aspects of the problem, discuss what has worked and not worked in various regions and with various constituencies, and brainstorm new ways of thinking about the issues. This meeting will be documented and the results distributed to the Participant Organizations and to the NEA as the "Audience Outreach Report."

Phase I Advancement - is the period of Technical Assistance from August 1990 to August 1991, during which Participant Organizations work with their assigned consultants in the development of a written, fully budgeted long range plan. This plan, together with an Application for Phase Two funding are submitted by August 16, 1991.

Phase II Advancement - is the grant period beginning November 1, 1991 during which the grant award (not announced before late November 1991) must be matched three-to-one by the recipient organization. Two of the three dollars of this match must be from contributed income, and the remaining third can be matched by earned income.

LONG RANGE PLAN COMPONENTS

Your organization, with the assistance of your Advancement Consultant, will develop a long-range plan that is tailored to your specific needs and circumstances. Each participating organization's plan, however, should address the following areas in some form:

- Mission Statement
- Program(s)
- Marketing
- Public/Community Relations
- Fundraising
- Financial Management
- Staff
- Board of Directors
- Facilities
- Budget

For each area, you should indicate **what** you plan to do, **why** you plan to do it, and **who** will be responsible for seeing that it gets done.

Time Frame

The plan should include, at a minimum, two years beyond the fiscal year you are in when your Phase II application is submitted (August 16, 1991).

Budgets

The Budget section should include two years of actual budget figures, the current fiscal year, and a minimum of two years projected budgets. It is strongly recommended that budget line items be thoroughly footnoted and income assumptions documented.

PARTICIPANT'S ORIENTATION TRAVEL AND EXPENSE REIMBURSEMENT

Transportation Expenses

Transportation to and from the Participant's Orientation is reimbursable. This includes airfare, train tickets, and bus, subway or taxi fares. If you are traveling by car, you will be reimbursed at the rate of \$0.24 per mile plus tolls and parking fees. You must submit receipts (as indicated below) for any transportation expenses. If you are traveling by car, you must also complete the "Private Car Log" section of the Participant's Expense Report.

Per Diem Expenses

The per diem is \$127 per person, to cover food and lodging expenses. Transportation costs, including local public transportation, are not included in that amount. Your lodging expense at the J.W. Marriott, to be deducted from your per diem, will be \$104.37 (\$93 plus tax) per night for a single room, or \$126.93 (\$113 plus tax) for a double. You will be billed individually for your lodging. Please include your hotel bill in your request for reimbursement.

The government requires that the program assess participants \$7 for each meal furnished during our meetings, so please calculate a \$7 charge against your per diem for lunch on Friday and Saturday. To allow participants to sample local restaurants, we plan to have individuals make their own dinner arrangements. A list of restaurant options will be provided, along with other information on Washington sights, when you arrive in Washington. Breakfasts should also be arranged individually.

Reimbursement Restrictions

We cannot reimburse you for any of the following:

- *Per diem expenses above \$127 per day per person
- *Any alcoholic beverages
- *Expenses for which you do not have valid receipts

Requesting Reimbursement

To request reimbursement for your travel expenses, complete the Participant's Expense Form and return it to Melanie Beene & Associates no later than September 5, 1990. **The Participant's Expense Form must be accompanied by valid receipts for all expenditures.** The form is included in this manual. Additional forms will also be available at the Participant's Orientation.

Reimbursement Documentation

Required receipts include hotel bills, meal receipts with the date and the name and address of the restaurant printed on the receipt, shuttle bus and/or taxi receipts, the last page of your airline ticket, and/or train ticket stubs. Many bottom-of-the-check stubs in restaurants do not have the name of the restaurant, so please ask the cashier to stamp the restaurant name on it. Credit card receipts are not acceptable.

PARTICIPANT ORIENTATION - PARTICIPANTS EXPENSE REPORT

PARTICIPANT ORG.:		FOR PERIOD: 8/9/90 TO 8/12/90			
DATE:	8/9/90	8/10/90	8/11/90	8/12/90	TOTAL
TRAVEL					
Air/Train/Car*					
Bus/Subway/Taxi					
Tolls/Parking					
Other					
SUBTOTAL TRAVEL					
PER DIEM (Limited to \$127/day per person)					
Room & Tax					
Breakfast					
Lunch					
Dinner					
Other					
Less: Per Diem Overrun					
SUBTOTAL PER DIEM					
TOTAL EXPENSE INCURRED					
LESS: PROTRAVEL BILLED DIRECT					
(Attach last page of ticket)					
LESS: NONREIMBURSEABLE CHARGES					
(Describe)					
TOTAL DUE					
MAKE CHECK PAYABLE TO:					
PLEASE REMEMBER TO ATTACH RECEIPTS FOR ALL EXPENSES					
*Private Car Log					
Date	Amt. @ \$0.24/mile				
Total					

REQUEST FOR SPECIAL NEEDS ALLOWANCE

Each Participant Organization has access to an allowance of up to \$6,000 for meeting special needs during the Advancement process. This allowance may be used for technical consultants, training or equipment. For the first time this year, these funds can also be used to bring in outside consultation on the artistic product. **The Special Needs Allowance cannot be used for general operating support.**

Your Advancement Consultant will work with you to determine the most appropriate use of these funds to enhance the Advancement process. This is usually done after completing the organizational self-assessment. The funds can be requested at any time, but must be used before June 30, 1991, or they will be reallocated.

Requesting Special Needs Allowance Funds

1. **Submit to Melanie Beene & Associates no later than December 30, 1990**, your plan for use of the Special Needs Allowance. This should be a simple letter, no more than two pages, signed by your Executive Director, your Board President and your Advancement Consultant. The letter should include how and when you will spend the funds.
2. After you have submitted this plan, you may request the funds at any time. **You must request the funds before June 30, 1991, or they will be reallocated.**
3. **Requests funds on the Special Needs Allowance Request Form. You must include appropriate documentation with your request:** a resume and signed letter of agreement for hiring a consultant; copies of invoices or paid bills for other expenditures. Hardship cases (i.e., cash flow problems that prevent you from expending the funds and applying for reimbursement) may be negotiated separately with Melanie Beene & Associates.
4. **\$1,000 is the minimum amount** you may request at one time.
5. Checks will be made payable to the participant organization, not to a consultant or vendor.

NEA PROGRESS REPORTS

Each Participant Organization must submit four Progress Reports to the NEA Advancement Office during Phase I of the Advancement Program.

The Progress Report should **briefly** address the following points:

1. Summarize your progress to date in meeting the specific objectives of your work plan. Is the planning process moving satisfactorily?
2. Are you encountering any problems or difficulties which the Advancement Program Office should seek to correct? Do you have any suggestions on how to improve the program design or its implementation?
3. Have you used outside resources (specialist consultants, publications, training, etc.) that you would recommend to others?

The Progress Report should be signed by your Executive Director and your Board President.

Please include any press clippings, brochures, or other materials relating to or resulting from your participation in Advancement.

Due Dates for Reports

Progress Report 1	December 14, 1990
Progress Report 2	March 1, 1991
Progress Report 3	June 15, 1991
Progress Report 4	August 30, 1991

Progress Reports should be mailed to:

Advancement Program
National Endowment for the Arts, Room 617
1100 Pennsylvania Avenue, NW
Washington, DC 20506

PHASE II APPLICATION FOR ADVANCEMENT GRANT

In order to fully prepare you for the tasks ahead we are enclosing a copy of the FY89 Application for an Advancement Grant with the caveat that your application (due August 16, 1991) may well include changes recommended after the peer panel review of the 1989 Participant Organizations.

The following application is an amplification of that used in prior years. Its additional questions were included on the request of the review panel for more information. It is our recommendation, based on this year's experience with Advancement, that you begin this application as soon after completing the plan as possible, while your plan is fresh in your mind. Those groups who waited a month to begin the application found the process more difficult.

It is suggested that you also review the requirements of the Consultant's Narrative which will summarize your experience in Phase I Advancement and which you will be asked to sign. FY89 is the first year in which Advancement Consultants have been allowed input in the review process. This is a result of a request from Participant Organizations who wanted to be evaluated on both the objective results of the plan itself and more subjective accomplishments achieved during the process of technical assistance.

NATIONAL
ENDOWMENT
FOR
THE ARTS

WASHINGTON
D.C. 20506



A Federal agency advised by the
National Council on the Arts

SAMPLE

April 2, 1990

MEMORANDUM

TO: FY 89 Advancement Participants

FROM: Jeanne B. Hodges, Director
Challenge and Advancement Grant Programs

REF: Phase II Application Forms

Enclosed are the revised Phase II application forms. The changes reflect meetings and extensive conversations with the managing consultant, your consultants, previous participants, panelists, and program staff. During these discussions it was made clear that more background information should be provided about the applicant; and their Phase I experience. We have also discussed and clarified the Review Criteria for Phase II applications so that future Advancement Grant panelists will have a clearer understanding of their role in the process. As you will see, the application remains the same, but with some additions.

The Applicant Organization Overview questions are some of the same questions which appeared in the Phase I application. It is now two years since you first answered the questions. Please do not duplicate your answers from that application, instead, update the information and prepare new responses.

The Supplementary Narrative questions focus primarily on an executive summary of your plan; your fundraising plans; and technical assistance experience. They are also intended to give the panelists your assessment of what your organization's strengths and weaknesses were at the beginning and upon completion of technical assistance; and what your organization accomplished (aside from producing a plan) during technical assistance.

The Consultant Narrative has been developed as a result of the panelists' desire for additional input into the process of evaluating the appropriateness of the plan; fundraising capacity; and ability to implement the plan and proposed project. Your consultant will prepare these narratives and share them with you. Once you and your consultant have reviewed the Consultant Narrative, it should be signed and dated by both of you and submitted as part of your application package.

We have also expanded upon the Required Attachments. The request for a current fiscal year operating budget, programming lists and season brochures, etc. are intended to provide additional information about your organization and its artistic endeavors during the technical assistance phase.

Memorandum - FY 89 Advancement Participants

April 2, 1990

Page Two

Each element of the review criteria carries the same relative weighting. The Review Criteria has been revised, but only for clarification purposes; there are no new criteria. The underlined portions are where the clarifications occur:

Ability to Plan: Quality of the organization's multi-year plan and the appropriateness of the Phase II request.

Excellence and Stability: The excellence of and ability to implement the Phase II request and multi-year plan while maintaining or exceeding the current level of excellence.

Fundraising: Ability to raise the necessary funds to meet the required three to one match.

Impact: The significant difference Phase I has made and the Advancement Grant will make to the organization at this time.

National
Endowment
for the Arts



Phase Two:
Advancement Grant

Arts in Education
Expansion Arts
Inter-Arts
Museum
Music
Theater

Advancement

Phase Two: Advancement Grant

For FY 89 Advancement Participants

Eligibility

In addition to the general eligibility requirements on pages 7 and 8, applicants must:

- Have completed the Planning/Technical Assistance Phase of the Advancement Program.
- Have independent audited financial statements for each year during participation in the Planning/Technical Assistance Phase and each year during the Advancement Grant period. For additional information please refer to "Notes on Financial Statements" on page 19.

Review Criteria

Applications to participate in Phase Two and receive an Advancement Grant will be reviewed against the following criteria:

- Ability to Plan. Quality of the organization's multi-year plan and the appropriateness of the proposed project(s), if applicable.
- Excellence and Stability. The excellence of and ability to implement the proposed project(s) and multi-year plan while maintaining or exceeding the current level of excellence.
- Fundraising. Ability to raise the necessary funds to meet the required three to one match.
- Impact. The significant difference an Advancement Grant will make for the organization at this time.


Application Review

The application review process for an Advancement Grant, Phase Two, consists of the following three steps:

Step 1. Applications will be reviewed by both the Advancement Program staff and the staff of the appropriate Arts Endowment program areas for compliance with the guidelines.

Step 2. The applications are then reviewed by an Interdisciplinary Advancement Review Panel according to the review criteria above.

Step 3. The Review Panel will forward a list of recommended grants to the National Council on the Arts for further review and then to the Chairperson of the Arts Endowment for final decision.

Note: Change from Guidelines 

Grant Period

The Advancement Grant period will begin no earlier than November 1, 1990 and may run to the end of the grantee's second full fiscal year, with the end date to correspond with the end of the organization's fiscal year.

Grant Amounts

In general, grant amounts will range from \$25,000 to \$75,000.

(Continued on next page)



Assurance of Compliance with National Endowment for the Arts Requirements under Title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, the Age Discrimination Act of 1975, the Drug-Free Workplace Act of 1988, Title IX of the Education Amendments of 1972, and Executive Order 12549, "Debarment and Suspension."

As a condition to approval of a grant, the Arts Endowment requires organizational and individual project applicants to execute this "Assurance of Compliance" form, whether or not a comparable form has been filed with another agency.

The Applicant referred to in the form is the individual or the organization itself, whose chief executive officer or comparable official should sign. The name and title of the organization and of the official should be typed on the form. The signed original should be returned with other required application materials to the Arts Endowment's Information Management Division. It should be noted that signing this form indicates a commitment to comply with the five statutes and the Executive Order referred to herein.

_____ (hereinafter called the "Applicant")
Hereby Agrees that it will comply with Title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000 et seq.), Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), the Age Discrimination Act of 1975 (42 U.S.C. 6101 et seq.), and, where applicable, Title IX of the Education Amendments of 1972 (20 U.S.C. 1681 et seq.) as well as all regulations of the National Endowment for the Arts issued pursuant to these statutes. Title VI, Section 504, and the Age Discrimination Act prohibit discrimination on the basis of race, color, national origin, handicap, or age in any program or activity receiving Federal financial assistance. Title IX prohibits discrimination on the basis of sex in any education program receiving Federal financial assistance. The Applicant Hereby Gives Assurance that it immediately will take any measures necessary to comply.

The assurance with regard to the above laws and regulations shall obligate the Applicant for the period during which the Federal financial assistance is extended. There are two exceptions. If any personal property is acquired with Endowment assistance, this assurance shall obligate the Applicant for the period during which it retains ownership or possession of that property. If any real property or structure is improved with Endowment support, this assurance shall obligate the Applicant or any transferee for as long as the property or structure is used for the grant or similar purposes.

In addition, as required by regulations implementing Executive Order 12549, "Debarment and Suspension," the applicant certifies, by submission of this application and Assurance of Compliance, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency. It further agrees that it will include this clause without modification in all lower tier covered transactions (excluding contracts under \$25,000), solicitations, and proposals. Where the applicant or any lower tier participant is unable to certify to this statement, it shall attach an explanation to this Assurance of Compliance.

Further, as required by the Drug-Free Workplace Act of 1988 (41 U.S.C. 701 et seq.; also implemented through the Debarment and Suspension regulations), an organizational applicant certifies that it will provide a drug-free workplace by:

(a) publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee's workplace and specifying the actions that will be taken against employees for violation of such prohibition;

(b) establishing a drug-free awareness program to inform employees about—

- (1) the dangers of drug abuse in the workplace;
- (2) the grantee's policy of maintaining a drug-free workplace;
- (3) any available drug counseling, rehabilitation, and employee assistance programs; and
- (4) the penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;

(Continued on next page)

Instructions for Completing Project Grant Application Form NEA-3

Method of Funding Advancement Grants

Advancement Grants are awarded using a type of appropriated Federal funds called "Treasury Funds." Therefore, the following information is applicable to all requests.

Treasury Funds Treasury Fund grants, designed to help applicants increase or sustain nonfederal contributions, generally must be matched with at least three nonfederal dollars for each Federal dollar. They are not available for projects or in amounts different from those specified in the regular guidelines.

Organizations applying for a Treasury Fund grant should so indicate in Section VII of the Grant Application Form. The amount requested from the Endowment may not exceed 25% of the total project cost.

The release of Federal funds is contingent upon the following: a grantee's securing and documenting for the Endowment, pledges and/or contributions at least equal to the amount of the Federal funds; and the approval of the Endowment of this documentation. This is referred to as the first match. The remaining minimum project cost (at least double the Federal monies) must be met with additional matching funds secured by the grantee organization.

For example:

Advancement grant	\$ 25,000
First match by grantee	25,000 ¹
Additional matching by grantee	50,000 ²
Minimum project cost = \$100,000	

Advancement Grant Requirements:

- ¹ Must consist of non-Federal contributed income.
- ² May include up to 50% earned income with the balance in non-Federal contributed income.

Instructions for Completing Project Grant Application For NEA-3

These instructions are keyed to the numbered sections of the application form.

- I. Applicant organization. The name provided here must be identical to that in the IRS determination letter for tax-exempt status or in the official document identifying the organization as a unit of either state or local government.
- II. The category under which support is requested is Advancement Phase II Grants.
- III. Period of support requested is the span of time necessary to plan, execute, and close out the proposed project. Please consider ending the grant period with your fiscal year end, or with a fiscal quarter, up to approximately 32 months. You may request a shorter grant period.
- IV. Summary of project description. Begin in the space provided, clearly state how the requested Federal and required matching funds will be spent. You may attach up to three pages to address the following: how the project relates to the priorities established in your multi-year plan; how the project will be implemented; how the matching funds will be raised; and, what will be the lasting effects of implementing this portion of the plan.
- V. Estimated number of persons expected to benefit from this project is the total audience members, participants, students or others (excluding employees and performers) who are anticipated to benefit directly.
- VI. Summary of estimated costs is a recapitulation of direct costs and indirect costs as shown on pages 2 and 3 of the application form.
- VII. Total amount requested from the National Endowment for the Arts. Because the Advancement Grant uses Treasury Funds, the total amount shown should not exceed 25% of the Total Project Costs. The amount requested should be rounded to the nearest \$1,000.
- VIII. Organization total fiscal activity
 - A. Expenses should include Arts Endowment projects funded and anticipated.
 - B. Revenues, grants and contributions should include Arts Endowment grants received and anticipated.
- IX. Budget breakdown of summary of estimated project costs
 - A. Direct costs are those which can be specifically identified with the project.
 1. Salaries and wages must be estimated at rates no less than prevailing minimum compensation as set out in the Code of Federal Regulations. Fringe benefits may be included here only if not included as indirect costs.
 2. Supplies and materials include consumable supplies, raw materials for fabrication of project items, and items costing less than \$5,000 or with an estimated useful life of one year or less.

Phase Two: Advancement Grant

Project Grant Application Form NEA-3 (Rev.)

Submit the original and two copies (no pages larger than 8 1/2" by 11") of application materials to: Advancement Program, Room 617, National Endowment for the Arts, Nancy Hanks Center, 1100 Pennsylvania Avenue, N.W., Washington, D.C. 20506.

I. Applicant Organization
(name, address, zip)

II. Category under which support is requested:

ADVANCEMENT

Phase II Grants

III. Period of support requested:

Starting / /
 month day year
Ending / /
 month day year

Project
Director: _____

Telephone: _____

IV. Summary of project description (Specify clearly how the requested funds will be spent.)

Please attach a more detailed project description. Include how the project application fits into the plan and why this particular project was selected. You may use up to three pages.

V. Estimated number of persons expected to benefit from this project

VI. Summary of estimated costs (recapitulation of budget items in Section IX)

Total costs of project

A. Direct costs

Salaries and wages _____ \$ _____
Fringe benefits _____
Supplies and materials _____
Travel _____
Permanent equipment _____
Fees and other _____

Total direct costs \$ _____

B. Indirect costs

_____ \$ _____

Total project costs \$ _____

VII. Total amount requested from the National Endowment for the Arts..... \$ _____

NOTE: This amount (Amount requested): \$ _____

PLUS Total contributions, grants, and revenues (X, page 3): + _____

MUST EQUAL Total project costs (VI. above): = _____

☐ Please check if your request includes
Treasury Fund monies

VIII. Organization total fiscal activity

Most recently completed fiscal year
(Ending _____ month _____ year)

Estimated for current fiscal year
(Ending _____ month _____ year)

A. Expenses

1. \$ _____ 2. \$ _____

B. Revenues, grants, and contributions

1. \$ _____ 2. \$ _____

Do not write in this space

IX. Budget breakdown of summary of estimated costs (continued)

3

4. Permanent equipment

Amount
\$

Total permanent equipment \$

5. Fees for services and other expenses (list each item separately)

Amount
\$

Total fees and other \$

B. Indirect costs

Rate established by attached rate negotiation agreement with
National Endowment for the Arts or another Federal agency
Rate _____% Base \$ _____

Amount

\$

X. Contributions, grants, and revenues (for this project)

A. Contributions

Amount

1. Cash

\$

2. In-kind contributions (list each major item)

Total contributions \$

B. Grants (do not list anticipated grant from the Arts Endowment)

\$

Total grants \$

C. Revenues

\$

Total revenues \$

Total contributions, grants, and revenues for this project \$

**Phase Two:
Advancement Grant**

Applicant organization: _____

5

APPLICANT ORGANIZATION OVERVIEW

1. What is the purpose of your organization?

(continued on reverse)

**Phase Two:
Advancement Grant**

7

Applicant organization: _____

APPLICANT ORGANIZATION OVERVIEW

- 3. Organizations with artistic programming:** Describe how your organization fits artistically into your local community. Do you complement and/or work with other arts organizations? Other organizations (e.g., Arts in Education, service organizations): Describe how your organization fits into your local community and how it complements and/or works with other organizations related to your program area.

-
- 4. Within your program area, describe your organization on a regional or national level.**
-

CONSULTANT NARRATIVE
(up to three pages)

- | <u>Advancement Participant</u> | <u>Consultant</u> |
|---|-------------------|
| 1. Describe the the process and the progress of the organization's participation in Advancement Phase I. | |
| 2. Comment on the participant's long range plan; including the appropriateness of plans, ability to implement the plan and to make the match. | |
| 3. Describe the process that has (or has not) been put in place for continuing the planning process, and the organization's commitment to it. | |
| 4. Describe the strengths and challenges that you feel the participant faces as it enters Advancement Phase II. | |
| 5. Comment on any managerial or artistic changes in the organization during technical assistance, that may have affected the organization's artistic quality. | |
| 6. Comment on the state of the organization's financial and managerial systems and conditions at the beginning of technical assistance and at the time of Phase II application. | |

This narrative should be prepared by the consultant and shared with his/her participating organization. Both parties should signify that they have shared and read the narrative by signing and dating the report.

The consultants' narrative should be submitted by the participating organization as part of their Phase II Advancement application package.

SUPPLEMENTAL NARRATIVES

1. Provide an executive summary (up to two pages) of your long range plan. This executive summary should include an overview of the long range plan and give its reader a sense of all components of the plan and their relative priorities.
2. Briefly outline (up to two pages) the strategies the organization will employ for raising the required Advancement grant matching funds.
3. Provide a narrative (up to three pages) about your organization's Phase I activities and accomplishments. It should include the work undertaken and specific progress achieved; insight about the conditions of financial and managerial systems of the organization before and as a result of technical assistance; and any changes in the organization that may have affected the organization's artistic quality (pro or con) during technical assistance.

REQUIRED ATTACHMENTS

- Three copies Supplemental Narratives
- Three copies Consultant Narratives
- Two copies of the Assurance of Compliance form
- Three copies of the Advancement (Phase I) multi-year plan
- Three copies current fiscal year operating budget and balance sheet
- One copy of the applicant's FY 89 audited financial statements (if they have not already been submitted)
- One copy of FY 90 audited financial statements as soon as they are available, but not later than 120 days following the end of the fiscal year.
- Two copies each of a one-page list of 1989/90 programming and a one-page list of 1990/91 programming.
- Two copies each of sample season brochures, books published, exhibition catalogues, curriculum packages or other informational materials produced by the organization since April 1989.

PARTICIPANT ORIENTATION ATTENDEES

ALLEGHENY HIGHLANDS REG. THEATER

Noel Feely

Mark Hirschfield

AFRICAN-AMERICAN DANCE THEATRE

J. Lee

Nayo Watkins

AUSTIN LYRIC OPERA

Penny Burnett

Joseph McClain

CALYX

Margarita Connelly

Carolyn Sawtelle

CAPP STREET PROJECT

CTR. FOR EXPLORATORY & PERCEPT. ART

Craig Centrie

Gail Nicholson

CTR. FOR PHOTOGRAPHY AT WOODSTOCK

Colleen Kenyon

Katherine Kenyon

CHINESE AMERICAN EDUCATION CENTER

Chen Oi Chin-Hseih

Kingman Yee

CITYFOLK

Phyllis Brzozowska

Judy Mott

COCONINO CENTER FOR THE ARTS

Nancy Black

David D. Vaselaar

COLORADO DANCE FESTIVAL

Felicia Dryden

Marda Kirn

Noel Hefty

COMM. FILM WORKSHOP OF CHICAGO

Margaret Caples

Regina Hayes

DANCE BAY AREA

Susan Chung

Lillian Goldthwaite

DANCE BRIGADE

Cindy Cleary

Nina Fichter

DANCE CLEVELAND

Stephanie Brown

Lucinda Lavelli

Jeffrey Glazer

PARTICIPANT ORIENTATION ATTENDEES

DAVID ADLER CULTURAL CENTER

Diane Douglas

Doug Miller

DIVERSEWORKS

Caroline Huber

Michael Peranteau

H.T. DANCE COMPANY

H.T. Chen

Ms. D. Dong

HOSTOS CULTURE & ARTS PROGRAM

William Aguado

Wallace Edgecombe

HOUSTON CENTER FOR PHOTOGRAPHY

Jean Caslihn

Clint Willour

INTERSTATE FIREHOUSE CULTURAL CTR.

Sue Busby

Sheryl Warren

JOMANDI PRODUCTIONS

Marsha Jackson

LIME KILN ARTS

Stephen Carr

MEXICAN MUSEUM

Marie Acosta Colon

Ruben Garcia

MUNTU DANCE THEATRE

Joan Gray

MUSEUM OF CONTEMP. HISPANIC ART

Nilda Peraza

NATL. INSTITUTE OF ART & DISABILITIES

Elias Katz

Ms. P. Rand

Larry Stefl

NAATA

James Yee

OMAHA BALLET SOCIETY

Michael Runice

Robert Vickrey

Sue Weidner

PITTSBURGH DANCE COUNCIL

Carolelinda Dickey

Paul Organisak

PARTICIPANT ORIENTATION ATTENDEES

PITTSBURGH FILMMAKERS

Aldine King

Margaret Myers

PYRAMID ARTS CENTER

John Borek

Laurence Champoux

S.F. CINEMATHEQUE

Steve Anker

Eric Theise

SAN JOSE TAIKO GROUP

P.J. Hirabayashi

Jean Shimoguchi

SEALASKA HERITAGE FDN.

Timothy Wilson

SMALL PRESS DISTRIBUTION, INC.

Lisa Domitrovich

Ellen Towell

SYRACUSE OPERA

Pat Pedro

Julie Richard

TANDY BEAL & CO.

Sheila Baumgarten

Linda Niebanck

Cynthia Kilian

THE WRITER'S VOICE

Jason Shinder

Cynthia Sosland

WESTERN FOLKLIFE CENTER

Hal Cannon

Cyd McMullen

WORLD MUSIC INSTITUTE

Melissa Lang

Eileen Macholl

WRITERS & BOOKS

Jan Gleason

Laurie Mercer

ZENON DANCE COMPANY

Susan Ladwig

Gary Peterson

1990/91 ADVANCEMENT PROGRAM PARTICIPANTS

African-American Dance Ensemble
120 Morris Street/P.O. Box 6945 College
Station
Durham, NC 27708
Nayo Watkins
Executive Director
(919)560-2729

ALJIRA, Inc.*
2 Washington Place
Newark, NJ 07102
Victor Davson
Executive Director
(201)643-6877

Allegheny Highlands Regional Theater
526 West Ogle Street
Ebensburg, PA 15931
Noel Feeley
Managing Director
(814)472-4333

Alternative Worksite/Bemis Foundation*
614 S. 11th Street
Omaha, NE 68102
Ree Schonlau
Executive Director
(402)341-7130

American Poetry Review*
1704 Walnut Street
Philadelphia, PA 19103
David Bonanno
Editor
(215)732-6770

Austin Lyric Opera
P.O. Box 984
Austin, TX 78767
Joseph McClain
General Director
(512)472-5927

Calyx
P.O. Box B
Corvallis, OR 97339
Margarita Donnelly
Managing Editor
(503)753-9384

Capp Street Project/AVT
270 14th Street
San Francisco, CA 94103
Susan Miller
Program Director
(415)626-7747

Caribbean Dance Co. Of The Virgin Islands*
P.O. Box #3065, Christiansted
St. Croix, V.I. 00822
Jill Thompson
Managing Director
(809)778-8824

Center For Exploratory & Perceptual Art
700 Main Street, 4th Floor
Buffalo, NY 14202
Gail Nicholson
Executive Director/Curator
(716)856-2717

Center For Photography At Woodstock
59 Tinker Street
Woodstock, NY 12498
Colleen Kenyon
Executive Director
(914)679-9957

Chinese American Educational & Cultural
Center
1826 Glenwood
Ann Arbor, MI 48104
Chen Oi Chin-Hseih
Executive Director
(313)663-0099

*Target Technical Assistance Group

July 18, 1990

1990/91 ADVANCEMENT PROGRAM PARTICIPANTS

Cityfolk
P.O. Box 552
Dayton, OH 45402
Phyllis Brzozowska
Executive Director
(513)223-3655

Dance Brigade
P.O. Box 2962
Oakland, CA 94609
Cindy Cleary
General Manager
(415)465-3686

Coconino Center For The Arts
P.O. Box 296
Flagstaff, AZ 86002
Nancy Black
Director
(602)779-6921

Dance Cleveland
1422 Euclid Avenue, #611
Cleveland, OH 44115
Stephanie Brown
Director
(216)861-2213

Collective For Living Cinema*
41 White Street
New York, NY 10013
Nancy Graham
Executive Director
(212)431-5694

David Adler Cultural Center
1700 North Milwaukee Avenue
Libertyville, IL 60048
Diane Douglas
Executive Director
(708)367-0707

Colorado Dance Festival
P.O. Box 356
Boulder, CO 80306
Marda Kirn
Director
(303)442-7666

DiverseWorks
1117 East Freeway
Houston, TX 77002
Michael Peranteau
(713)223-8346

Community Film Workshop Of Chicago
1130 South Wabash, Suite 400
Chicago, IL 60605
Margaret Caples
Asst. Director
(312)427-1245

Double Helix Corporation*
625 North Euclid
St. Louis, MO 63108
Pat Watkins
Director
(314)361-8870

Dance Bay Area
2141 Mission Street, Suite 303
San Francisco, CA 94110
Lillian Goldthwaite
Executive Director
(415)255-2794

H.T. Dance Company
70 Mulberry Street, 2nd Floor
New York, NY 10013
H.T. Chen
Executive Director
(212)349-0126

*Target Technical Assistance Group

July 18, 1990

1990/91 ADVANCEMENT PROGRAM PARTICIPANTS

Hostos Culture & Arts Program
475 Grand Concourse
Bronx, NY 10451
Wallace Edgecombe
Director
(212)960-1009

Houston Center For Photography
1441 West Alabama
Houston, TX 77006
Jean Caslin
Executive Director
(713)529-4755

Interstate Firehouse Cultural Center
5340 N. Interstate
Portland, OR 97217
Sue Busby
Executive Director
(503)243-7930

Jomandi Productions, Inc.
1444 Mayson St., NE
Atlanta, GA 30324
Marsha Jackson
Co-Artistic/Managing Director
(404)876-6346

Kulintang Arts*
2940 16th Street, #200-2
San Francisco, CA 94103
Alleluia Panis
Executive Director
(415)553-8824

Lime Kiln Arts
P.O. Box 663
Lexington, VA 24450
Stephen Carr
Managing Director
(703)463-7088

Mexican Museum
Fort Mason Center, Bldg. D
San Francisco, CA 94123
Marie Acosta-Colon
Executive Director
(415)441-0445

Muntu Dance Theatre
6800 S. Wentworth-Rm.3E96
Chicago, IL 60621
Joan Gray
President
(312)602-1135

Museum Of Contemporary Hispanic Art
584 Broadway, 7th Floor
New York, NY 10012
Nilda Peraza
Director
(212)966-6699

National Institute Of Art & Disabilities
551 23rd Street
Richmond, CA 94804
Elias Katz
Director
(415)620-0290

Natl. Asian American Telecommunications
Assoc. (NAATA)
346 Ninth Street, 2nd Floor
San Francisco, CA 94103
James Yee
Executive Director
(415)863-0814

Omaha Ballet Society
2665 Fornam
Omaha, NE 68131
Michael Runice
Executive Director
(402)346-7394

*Target Technical Assistance Group

July 18, 1990

1990/91 ADVANCEMENT PROGRAM PARTICIPANTS

Pittsburgh Dance Council
719 Liberty Avenue
Pittsburgh, PA 15222
Carolelinda Dickey
Executive Director
(412)355-0330

Pittsburgh Filmmakers
P.O. Box 7467
Pittsburgh, PA 15213
Margaret Myers
Executive Director
(412)681-5449

Pyramid Arts Center
Village Gate Square, 274 N. Goodman Street
Rochester, NY 14607
Laurence Champoux
Executive Director
(716)461-2222

San Francisco Cinematheque/Fdn. For Art In
Cinema
480 Potrero Avenue
San Francisco, CA 94110
David Gerstein
Executive Director
(415)558-8129

San Jose Taiko Group
P.O. Box 26895
San Jose, CA 95159
P.J. Hirabayashi
General Manager
(408)293-9344

Sealaska Heritage Foundation
One Sealaska Plaza, Suite 201
Juneau, AK 99801
Timothy Wilson
Director of Development
(907)463-4844

Small Press Distribution, Inc.
1814 San Pablo Avenue
Berkeley, CA 94702
Lisa Domitrovich
Executive Director
(415)549-3336

Syracuse Opera
410 E. Willow Street/P.O. Box 6904
Syracuse, NY 13217
Robert Swedberg
General Director
(315)475-5915

Tandy Beal & Company
108 Locust Street, Ste. 5/P.O. Box 633
Santa Cruz, CA 95060
Sheila Baumgarten
Managing Director
(408)429-1324

The Writer's Voice
C/o YMCA/5 West 63rd Street
New York, NY 10023
Jason Shinder
Director
(212)787-6557

Western Folklife Center
P.O. Box 581105
Salt Lake City, UT 84158
Hal Cannon
Executive Director
(801)531-7704

World Music Institute, Inc.
109 W. 27th Street
New York, NY 10001
Robert Browning
Executive Director
(212)545-7536

*Target Technical Assistance Group

July 18, 1990

1990/91 ADVANCEMENT PROGRAM PARTICIPANTS

Writers & Books
740 University Avenue
Rochester, NY 14607
Joseph Flaherty
Executive Director
(716)473-2590

Zenon Dance Company & School, Inc.
528 Hennepin Avenue, #400
Minneapolis, MN 55403
Gary Peterson
Managing Director
(612)338-1101

*Target Technical Assistance Group

July 18, 1990

1990/91 ADVANCEMENT PROGRAM PARTICIPANTS BY STATE

ALASKA Juneau	Sealaska Heritage Foundation	Expansion Arts
ARIZONA Flagstaff	Coconino Center For The Arts	Folk Arts
CALIFORNIA Berkeley	Small Press Distribution, Inc.	Literature
Oakland	Dance Brigade	Dance
Richmond	National Institute Of Art & Disabilities	Expansion Arts
San Francisco	Capp Street Project/AVT	Visual Arts
San Francisco	Dance Bay Area	Dance
San Francisco	Kulintang Arts*	Expansion Arts
San Francisco	Mexican Museum	Expansion Arts
San Francisco	Natl. Asian American Telecommunications Assoc. (NAATA)	Media Arts
San Francisco	San Francisco Cinematheque/Fdn. For Art In Cinema	Media Arts
San Jose	San Jose Taiko Group	Expansion Arts
Santa Cruz	Tandy Beal & Company	Dance
COLORADO Boulder	Colorado Dance Festival	Dance
GEORGIA Atlanta	Jomandi Productions, Inc.	Expansion Arts
ILLINOIS Chicago	Community Film Workshop Of Chicago	Media Arts
Chicago	Muntu Dance Theatre	Expansion Arts
Libertyville	David Adler Cultural Center	Folk Arts
MICHIGAN Ann Arbor	Chinese American Educational & Cultural Center	Expansion Arts
MINNESOTA Minneapolis	Zenon Dance Company & School, Inc.	Dance
MISSOURI St. Louis	Double Helix Corporation*	Media Arts
NEBRASKA Omaha	Alternative Worksite/Bemis Foundation*	Visual Arts
Omaha	Omaha Ballet Society	Dance
NEW JERSEY Newark	ALJIRA, Inc.*	Visual Arts

1990/91 ADVANCEMENT PROGRAM PARTICIPANTS BY STATE

NEW YORK		
Bronx	Hostos Culture & Arts Program	Expansion Arts
Buffalo	Center For Exploratory & Perceptual Art	Visual Arts
New York	Collective For Living Cinema*	Media Arts
New York	H.T. Dance Company	Expansion Arts
New York	Museum Of Contemporary Hispanic Art	Expansion Arts
New York	The Writer's Voice	Literature
New York	World Music Institute, Inc.	Folk Arts
Rochester	Pyramid Arts Center	Visual Arts
Rochester	Writers & Books	Literature
Syracuse	Syracuse Opera	Opera/Musical
Woodstock	Center For Photography At Woodstock	Visual Arts
 NORTH CAROLINA		
Durham	African-American Dance Ensemble	Expansion Arts
 OHIO		
Cleveland	Dance Cleveland	Dance
Dayton	Cityfolk	Folk Arts
 OREGON		
Corvallis	Calyx	Literature
Portland	Interstate Firehouse Cultural Center	Expansion Arts
 PENNSYLVANIA		
Ebensburg	Allegheny Highlands Regional Theater	Expansion Arts
Philadelphia	American Poetry Review*	Literature
Pittsburgh	Pittsburgh Dance Council	Dance
Pittsburgh	Pittsburgh Filmmakers	Media Arts
 TEXAS		
Austin	Austin Lyric Opera	Opera/Musical
Houston	DiverseWorks	Visual Arts
Houston	Houston Center For Photography	Visual Arts
 UTAH		
Salt Lake City	Western Folklife Center	Folk Arts
 VIRGIN ISLANDS		
St. Croix	Caribbean Dance Co. Of The Virgin Islands*	Expansion Arts
 VIRGINIA		
Lexington	Lime Kiln Arts	Expansion Arts

1990/91 ADVANCEMENT PROGRAM PARTICIPANTS BY DISCIPLINE

Dance

Colorado Dance Festival
Dance Bay Area
Dance Brigade
Dance Cleveland
Omaha Ballet Society
Pittsburgh Dance Council
Tandy Beal & Company
Zenon Dance Company & School, Inc.

Expansion Arts

African-American Dance Ensemble
Allegheny Highlands Regional Theater
Caribbean Dance Co. Of The Virgin Islands*
Chinese American Educational & Cultural Center
H.T. Dance Company
Hostos Culture & Arts Program
Interstate Firehouse Cultural Center
Jomandi Productions, Inc.
Kulintang Arts*
Lime Kiln Arts
Mexican Museum
Muntu Dance Theatre
Museum Of Contemporary Hispanic Art
National Institute Of Art & Disabilities
San Jose Taiko Group
Sealaska Heritage Foundation

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1990/91 ADVANCEMENT PROGRAM PARTICIPANTS BY DISCIPLINE

Folk Arts

Cityfolk
Coconino Center For The Arts
David Adler Cultural Center
Western Folklife Center
World Music Institute, Inc.

Literature

American Poetry Review*
Calyx
Small Press Distribution, Inc.
The Writer's Voice
Writers & Books

Media Arts

Collective For Living Cinema*
Community Film Workshop Of Chicago
Double Helix Corporation*
Natl. Asian American Telecommunications Assoc.
Pittsburgh Filmmakers
San Francisco Cinematheque/Fdn. For Art In Cinema

Opera/Musical Theatre

Austin Lyric Opera
Syracuse Opera

Visual Arts

ALJIRA, Inc.*

*Target Technical Assistance Group

1990/91 ADVANCEMENT PROGRAM PARTICIPANTS BY DISCIPLINE

Alternative Worksite/Bemis Foundation*

Capp Street Project/AVT

Center For Exploratory & Perceptual Art

Center For Photography At Woodstock

DiverseWorks

Houston Center For Photography

Pyramid Arts Center

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American Poetry Review*

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Nancy Raine

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Kulintang Arts*
N.A.A.T.A.

Wendy Lesser

Calyx
Small Press Distribution, Inc.

Ellen Sollod

Colorado Dance Festival
Interstate Firehouse Cultural Center

Laurie MacDougall

Dance Brigade
Mexican Museum
San Jose Taiko Group
Tandy Beal & Company
Dance Bay Area

Bill Terry

H.T. Chen Dance Company
Muntu Dance Theatre
Zenon Dance Company

1990/91 ADVANCEMENT PROGRAM CONSULTANTS
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Western Folklife Center

Morrie Warshawski

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Dance Cleveland
Double Helix Corporation*
Chinese American Ed. & Cultural Ctr.
Omaha Ballet Society

John Wessel

Center for Exploratory & Perceptual Art
Pyramid Arts Center
Writers & Books

Carol Yamamoto

Austin Lyric Opera
Cityfolk
Syracuse Opera

Cheryl Yuen

Community Film Workshop of Chicago
David Adler Cultural Center

CONSULTANT BIOGRAPHIES

Melanie Beene and Associates

Melanie Beene, the Managing Consultant, has spent the last decade as an independent consultant dealing with the management issues of hundreds of diverse arts organization from throughout the country. She has worked with organizations of all sizes and with a variety of artistic disciplines and multi-cultural constituencies. A native of rural Appalachia, she is particularly interested in the needs of arts organizations in outlying areas. Beene has served as a Field Consultant to the NEA's Advancement Program since its inception in 1983. In addition from 1985 to 1989, Beene has: managed the National Alliance of Media Arts Organization's Management Assistance Program; designed a pilot Multi-Cultural Initiative Program for the NEA and San Francisco's Grants for the Arts/Hotel Tax Fund; and conducted the consultant training seminars and served as an on-site consultant in the California Arts Council's Multi-Cultural Professional Management Assistance Project.

Formerly the Associate Director of Development for the San Francisco Symphony and the American Conservatory Theater, Beene has taught, and, in a foundation staff capacity, served on grant review panels of the National Endowment for the Arts and the California Arts Council. In 1988, Melanie Beene and Associates published a research study on the factors contributing to the bankruptcy of the Oakland (California) Symphony: *Autopsy of an Orchestra*. Subsequently she was a featured speaker at the 1989 annual conference of the American Symphony Orchestra League (which also commissioned an article for Symphony magazine), and the 1988 California Association of Symphony Orchestras.

Beene's academic training is in Asian Art History (M.A.) and jurisprudence (J.D.). She is a member of the California Bar Association, and currently an Affiliate Artist (writer) maintaining a studio at the Headlands Center for the Arts (Sausalito, California).

Juliana Grenzeback is the former Development Director for City Celebration, a multi-cultural performing arts organization and previous Advancement program grantee. From 1984 to 1987, she was the Administrator for Young Audiences of the Bay Area. She has worked for 12 years in professional theatre, both as a stage manager and production manager, and was a co-founder and Producing Director for the Bay Area chapter of Theatresports, an international improvisational theatre "league". Her academic training is in finance and arts administration.

The Field Consultants

Jane C. Delgado is an independent consultant based in New York City who worked in last year's Advancement Program. Prior to Advancement she was the Executive Director of the Association of Hispanic Arts, a multi-disciplinary arts service organization. She has served as a panelist for the NEA, the Ohio State Arts Council, the New York State Council on the Arts, and NYC Department of Cultural Affairs. She has consulted with state arts agencies, written and spoken on the need for insuring diversity in our nation's cultural life. Her expertise is in human resource development, marketing, public relations, and management systems.

Laurel Jones has been the Vice President for Advancement at the San Francisco Art Institute since 1988, and is currently in the process of relocating to Texas. She participated in the Advancement Program as a grantee during her tenure as Director at the Aspen Art Museum in Colorado. Prior to that, she was the Administrator for the Museum of Fine Arts, Houston. Jones has served as a panelist for the NEA, the Colorado Council for the Arts and Humanities, the American Association of Museums, and the Institute for Museum Services. She has worked in an advisory capacity for the San Francisco Arts Policy Plan Project, and the Economic Task Force of the Aspen Foundation. She was also the editor of "50 Texas Artists" (Chronicle Books) and several other publications of the Aspen Art Museum.

Gregory Kandel is the founder of Management Consultants for the Arts in Cos Cob, Connecticut, a firm which specializes in executive search, long range planning, and organizational development. As an experienced Advancement consultant, Kandel emphasizes the special role that artists must play in running arts organizations. Prior to founding MCA, Kandel was based in Chicago where, in 1974, he founded the North Light Repertory, a professional regional theater; in 1978 he co-founded the League of Chicago Theatres, a trade association, and served as its first chairman. Kandel is a member of numerous organizations and has served as a guest lecturer at Yale University, Southern Methodist University and others. His clients have included: American Ballet Theatre, BAM, Trisha Brown Company, Bill T. Jones/Arnie Zane Dance, Guthrie Theater, San Antonio Symphony among others.

Nancy Legge began her career as Director of Publications and Information Services at the University Film Study Center at MIT, in Cambridge, Massachusetts. Subsequently, she worked as a consultant to the NEA Media Arts Program where she researched and wrote Access, a national directory of film and video production facilities. She was Acting Director of the TV/Media Program at the New York State Council on the Arts (NYSCA). Since 1979, she has been an independent consultant working with visual and performing arts clients in the areas of fundraising, long range

planning and board development. She has served as a panelist for the NEA and the Alaska Council on the Arts, and as an on-site evaluator for the NEA, NYSCA, and the Ohio Arts Council. Presently based on the West Coast, her recent clients have included the Anchorage Performing Arts Center, Alaska Repertory Theater, the San Francisco Art Institute and the San Francisco Symphony. Also a visual artist, Legge's current work is in figurative sculpture.

Wendy Lesser is a writer, university instructor, and the founding editor and publisher of The Threepenny Review. She has served as a consultant in promotion and fundraising to a variety of publications and organizations including: Representations, The Paris Review, Grand Street, Bay Area Book Reviewers Association (BABRA), and the Coordinating Council of Literary Magazines (CCLM). From 1977-81 she was partner in Lesser & Ogden Associates, a consulting firm that focused on research and program development in public policy areas. Other consulting projects have involved the development of a statewide program of grants to individual artists, land-use planning, and arts funding. A recipient of numerous grants and prizes, Lesser recently completed a Guggenheim Fellowship.

Laurie MacDougall, for the first seventeen years of her career, worked for major New York advertising agencies as a copywriter, creative director, and free-lance marketing consultant. She has been both an Advancement consultant and an Advancement grantee, the latter when she served as Executive Director of the Cabrillo Music Festival in Santa Cruz, California. During her five years at this contemporary music festival, she produced the U.S. premiere of a "community opera" by Hans Werner Henze. Subsequently, she worked in development at the San Francisco Symphony as Director of Volunteer Activities during which she managed galas, a thrift store, a retail wine program, a travel program and a volunteer force of 1,300 which raised over \$2.7 million. Based in San Francisco, she has worked, since 1988, as a consultant to arts and human service organizations. Laurie is currently an Affiliate Artist with the Headlands Center for the Arts.

John McCann is an independent consultant with extensive experience in theatre and dance. His consulting clients have included: the Kentucky Arts Council, Alternate ROOTS, Ballet Met, Potomac Theatre Project, Dance Alive!, Shawnee Theatre and Urban Bush Woman, among others. He has also been an on-site evaluator for the Kentucky Arts Council, the Ohio Arts Council, and the NEA. McCann is the former Co-Director of FEDAPT's Theatre/Dance Management Institute. He was also the Managing Director at the San Diego Repertory Theatre and, from 1987 to 1989, he was the Executive Director of Players Theatre Columbus in Ohio.

Halsey North heads the North Group Inc., a consulting firm specializing in strategic planning,

fundraising, Board and staff development, and management systems for nonprofit cultural organizations. His recent clients include: the Walton Arts Center, the American Institute of Graphic Arts, Scranton Arts Project, and the Arts Council of Fort Worth and Tarrant County, among others. North has also facilitated retreats and taught workshops on strategic planning/fundraising/board development for such groups as the Ulster Performing Arts Center, Center for Women and Their Work, Santa Fe Chamber Music Festival, the Association of Performing Arts Presenters, and the Western Alliance of Arts Administrators. In 1988 and 1989, North was the Managing Consultant for the NEA Advancement Program. Prior to the North Group, he was Executive Director of the Cultural Council Foundation, Vice President of C.W. Shaver & Company, and Manager of Corporate Contributions for Philip Morris Inc.

Patrice Walker Powell has served in either a staff or staff consultant capacity over the last seventeen years for the U.S. Department of Labor, Connecticut Commission on the Arts, D.C. Commission on the Arts and Humanities, and the Texas Commission on the Arts. She has a broad perspective on cultural arts issues gained from more than a decade of travel throughout the country as an on-site evaluator for the NEA. She has served as a panelist for the NEA, the South Carolina Arts Commission and the Kentucky Arts Council. As an independent consultant, her clients have included the Columbus Museum of Art, the Ohio Arts Council, Players Theatre Columbus, the Trident Community Foundation and a wide variety of developing arts organizations.

Nancy V. Raine is an arts consultant, writer and independent film producer. She has worked for the National Endowment for the Arts, both as Program Specialist (1972-1975) and Assistant Director (1975-1977) in the Media Arts Program. She has served on many boards and panels, and was Senior Development Officer for the Graduate School of Design at Harvard University. As a consultant, her clients have included: the Boston Symphony Orchestra; the Communications Consortium and the University Film Study Center (MIT); the Photographic Resource Center; and Eastern Public Radio Network, among others. Her recent clients include the John D. & Catherine T. MacArthur Foundation and the David & Lucile Packard Foundation. Among her publications are: Arts on the Line: A Public Art Handbook and The Arts and the New England Economy. She produced and co-directed with Richard Leacock a film on the visual artist Maud Morgan, selected for inclusion in the Fourth Ethnographic Film Festival, Paris; her poetry has appeared in The Massachusetts Review, The Southern Poetry Review, and The Women's Review of Books. She is currently an Affiliate Artist at the Headlands Center for the Arts.

T. Ellen Sollod is a visual artist and currently Executive Director of the Seattle Arts Commission. She has served as a consultant on long range planning and organizational

development, cultural facility planning, fundraising and marketing, public art, and television documentary development. She was previously Executive Director of the Colorado Council on the Arts and Humanities and Assistant Director of the Dance Program of the National Endowment for the Arts. Her consulting clients have included: WNET/NY; Barker Rinker Seacats Architects; Vail Valley Foundation; and numerous arts organizations. As a visual artist, she has been an artist-in-residence at the Ucross (Wyoming) Foundation and has exhibited in New York, Colorado, Texas, New Mexico, Arizona, and Seattle.

William Terry is an arts consultant based in New York and Detroit where he also serves as the Vice President for Educational Affairs for the Detroit Symphony Orchestra Hall. As a consultant, Terry has worked with the American Symphony Orchestra League, the American Opera Theatre, the Colorado Council on the Arts and Humanities, the Ohio Arts Council, and the National Jazz Service Organization, among others. Terry is currently an on-site evaluator for the NEA and is the Cooperator for the NEA's joint Expansion Arts Program-Dance Program Organizational Development Pilot Program. Formerly, Terry was Director of the NEA's Partnership Coordination, as well as the Managing Director for Dance Theatre of Harlem. Terry is also the pianist for Trio Pro Viva, which specializes in performing the music of black composers.

Sherry Wagner is an independent consultant, lecturer and writer. Her consulting clients have included: the Smithsonian Institute; the Houston Museum of Decorative Arts in Chatanooga; and the Wheelwright Museum of the American Indian in Santa Fe, among others. Her client work covers a broad range of services in the areas of exhibits, programs, management, education, facility planning/development and long-range planning. Wagner has written many scripts for film and television, including Carrascalendas, a PBS bilingual television series for children. She is the author of Look, Think, Discover, Create: A Guide to Teaching Creative Thinking Through Use of Community Resources (Smithsonian Institute), Creating Your City's Image (National League of Cities), and several children's books.

Morrie Warshawski is a writer and arts consultant now based in St. Louis whose clients cover a variety of artistic disciplines. He is the editor of The Next Step Independent Film and Video Distribution (AIVF, New York, 1990) and author of Where the Rubber Meets the Road: Presenting the Performing Arts in California (CAC, 1989). Warshawski was Executive Director of Bay Area Video Coalition (1983-86); The Media Project (1980-82); and Portland Dance Theater (1977-79). He was executive producer of a 90-minute dramatic feature film, The Stand In, starring Danny Glover; and of the Annual Conference Videotape for the Council on Foundations. He has served on a number of grant-making panels. His books have been exhibited at number of venues

including: American Cultural Center (New Delhi, India), Franklin Furnace Archive, Visual Studies Workshop, and New Langton Arts, among others.

John Collier Wessel began his professional career in the theater with five seasons at the St. Louis Municipal Opera and two seasons at the Phoenix Repertory Theatre in New York City. After serving as a Peace Corps Volunteer in Venezuela in an experimental project designed to use the arts in urban community development, he returned to the U.S. to work with the Arts & Education Council of St. Louis and, later, to direct the Staten Island Council on the Arts. John served as Program Director for NYSCA, Vice President of American Councils of the Arts, and NEA Regional Representative. Subsequently, Wessel opened the Wessel O'Conner Gallery in Rome, Italy, the only gallery in Europe exhibiting exclusively American artists. In 1987, Wessel O'Conner Gallery moved to New York, and in 1988 Wessel began consulting in the Advancement Program.

Carol Yamamoto has worked in many aspects of arts administration and with a variety of artistic disciplines. Formerly she was assistant development director for Seattle Opera, marketing director for Texas Opera Theater, and manager of Lyric Opera Center for American Artists. She is currently chair of the Arts, Entertainment & Media Management Department at Columbia College Chicago. An Advancement consultant since 1984, Yamamoto has served on city, state and regional funding panels, and is a consultant to the New Works Project at the John D. and Catherine T. MacArthur Foundation. Before entering arts management, she worked for three years as the first female sales representative for Honeywell. Born and raised on a Nebraska farm, she spent her youth riding the rodeo circuit in the Midwest. Yamamoto earned a Bachelor of Music degree in piano performance and an M.B.A. from U.C.L.A.

Cheryl Yuen has worked as a cultural development/arts management consultant since 1974. An M.B.A. graduate of UCLA's Arts Management Program, much of her work has been with state and local arts agencies, as well as grassroots, multicultural arts organizations. She was the Director of the Office of Local Partnership with the Illinois Arts Council (1982-1987), and has worked with the Chicago Office of Fine Arts, The Support Center, and the Alameda County (California) Neighborhood Arts Program. Her concentration is in planning, organizational development and meeting facilitation. She has served as a panelist and on-site evaluator for the NEA, and has been a member of the Challenge III evaluation team since 1988. Yuen was a board member of the National Assembly of Local Arts Agencies for six years, and is the author of COMMUNITY VISION: A Policy Guide to Local Arts Agency Development, 1990.

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