

85. Covid & the Art of Fundraising: A Theatre's Tale

Amy Hand, Mara Mignona, LeeAnet Noble, Alan Paul,
Neal Racioppo, Roger Whyte, Laura Willumsen

Kendall Lott: Hey PMs, stay tuned at the end for a programming announcement about PM Point of View® for the May episode. And beyond.

Laura Willumsen: How do you promote sponsorship, ask people to pay \$10,000 to attend the event and say it's free?

Alan Paul: We had a very short amount of time to do it, but we were so clear about *why* we were doing it, that the *What* came easy.

LeeAnet Noble: The purpose of the gala is to fundraise, is to celebrate and fundraise. And this was a time where it was heightened more than ever before.

Kendall Lott: On March 12, 2020, Broadway, the iconic symbol of the US theater world, shut down due to the Covid pandemic. Ten days later, the Shakespeare Theatre Company in Washington DC, closed two productions, “Timon of Athens,” starring Katherine Hunter and “The Amen Corner,” by James Baldwin. The sets stood abandoned on the stages, but there were no actors, no audience. Ticket money was refunded and the staff went into survival mode.

Spring turned to summer with no end in sight. As funds dwindled, the theater's management's one hope, the traditional annual fundraising gala, was still set for October. But would they be able to pull it off? Or would the pandemic continue to present insurmountable constraints? How can you throw a party, a festive formal affair with live performances, mingling over cocktails, and a sumptuous dinner, when social distancing is the modus operandi and indoor gatherings are forbidden? How can you raise money for a season of productions that may not be performed?

For this episode, I met with some of the key members of the team, to walk back through the sequence of events, decisions and actions that led to the brand new, totally reinvented Gala of 2020. We covered the PM things: Scope, Schedule, Budget, Quality, Team Dynamics and Stakeholders. But this project is in scary times. In the face of existential threat – let me be clear PMs, I'm talking job security – they sensed that reliance on the old ways wouldn't work. But knowing what could be was still undiscovered country. It turns out they leaned on some recognizable PM traits and pulled it off brilliantly. Shakespeare was spot on when he wrote, *Things done well and with care exempt themselves from fear.*

Announcer: From the Washington DC chapter of the Project Management Institute, this is PM Point of View®, the podcast that looks at project management from all the angles. Here's your host, Kendall Lott.

KL: The bubonic plague of the early 1600s was an intermittent presence for most of Shakespeare's adult life. During outbreaks, the Globe Theater in London closed, Shakespeare's troupe of King's

Men dispersed, and the Bard would retreat to Stratford and continue to write plays, including “King Lear,” “Anthony and Cleopatra,” and “Macbeth.” In a dark humor, a senior manager at STC said that when the DC government closed the city's stages, the Shakespeare Theatre Company at least was still on brand.

It wasn't till the end of summer 2020 that the staff at DC's Shakespeare Theatre Company fully absorbed the gravity of their dilemma. Yes, they absolutely had to have a gala; but no, it wasn't going to be anything like past years. *We know what we are, but not what we may be.* At that point, they had very little time for logistics – about eight weeks actually – to pull off the party of the year...which wasn't even going to be a party anymore.

The natural creativity of the gala team (these are professionals in the performing arts, after all) kicked in, reshaping their roles and functions. By clearly defining their updated mission and scope, they were able to move forward, responding swiftly to obstacles, keeping their eye on the gala's performance deadline.

Objectives, tactics, obstacles and high stakes. It's all there. This is a tale of change and some of the actions we can take as leaders, even in the business uncertainty of a pandemic.

All things are ready if our minds be so.

KL (04:03): What I'd like us to start with, each of you introducing yourself, your name and your title and role. Alan, you're on my left. So turning to my left...Alan!

Alan Paul: I'm Alan Paul. I am the Associate Artistic Director of Shakespeare Theatre Company, and I was the co-director of the Gala.

KL: Who was your other director? You said co-director.

AP: LeeAnet Noble.

KL: So LeeAnet, I hear you're a co-director... Tell us more.

LeeAnet Noble: LeeAnet Noble. I am the Director of Equity and Enrichment at Shakespeare Theatre Company, and I served as the co-director, alongside Alan, for the gala.

KL: And Amy.

Amy Hand: I'm Amy Hand. I'm the general manager here at Shakespeare Theatre. And I did all the general management for this gala that we put on.

Laura Willumsen: I'm Laura Willumsen, Senior Director of Development for Shakespeare Theatre Company, and I am responsible for all contributed revenue for the company, which includes fundraising events, the largest of which is the annual gala.

KL: And Roger.

Roger Whyte: My name is Roger Whyte, I'm the Principal and Founder of RJ Whyte Event

Production. We are an event production firm based here in Washington, DC, and since March have moved over into the virtual event world, where we have been helping out clients, like Shakespeare Theatre Company, with their big virtual events.

Neal Racioppo: I am Neal Racioppo, Senior Director of Marketing and Communications, and I oversaw the marketing and communications for the event, had a little input in terms of some of the content that happened during the show.

Mara Mignona: So I am Mara Mignona. I am the Development Events Manager here at STC. So I plan all of the internal events for our company, mostly fundraisers, but also some of the small stewardship events that we have. And since I am the events manager at the company, I was kind of involved in all aspects of planning the gala.

KL: (06:11): There you were, right? A pandemic has happened, no one's showing up at theaters, and you can't even put actors together. And we have to get to our annual fundraiser, the gala. When did you each get your first like, *This is going to be different, and this is my first action?* Where did you enter the process?

Neal Racioppo: I think shortly after we closed the theaters for the pandemic. We had two shows running at the time, we closed those down. We're in scramble mode. How long is this going to be? Is this going to be weeks? Is this going to be months? And we started looking down the road at other things that we had on the calendar: Okay, we're cancelling these other shows. Oooh, we're going to have to cancel a lot of next season, too. Oh, oh, this is going to be going for quite some time. You start with the tip of the iceberg and you realize how massive it is and all of the things that are going to be affected.

And I think there was a lot of conversation about, do we not do the gala? And early on, I think a decision was made that we needed to do the gala. We needed to find a way to make it happen. And luckily, we work with a lot of creative people who are not afraid to innovate, and a lot of theaters have had to deal with at this time, and started thinking, Alright, well, what could it be?

My team was fortunate that early on, I think Day Two of being shut down, I said to everyone on the marketing team, "Hey, we all work for the Development Department now. And everything we do moving forward is going to be about driving these events that typically we would not have as strong a hand in. When we're not able to show people live theater, we have other things to market right now, and it's why we're here, why the arts are important, why Shakespeare Theatre Company is important, and how people can still stay connected to us."

KL: Yeah, I liked how you said that. It's a shift of roles. From PM speak, there was a shift of roles for your operation from...We're not doing live events, our normal role of using our expertise to help out with that. But rather, there's a new need in the organization as it makes a shift.

Laura Willumsen (08:27): We had a very clear goal, which everyone understood, which is we had a certain amount of money we had to make. But how we were going to make it wasn't necessarily going to be the same. We knew that the program needed to incorporate fundraising during the show, which was really a brand new element. And so that was something that everyone had to take into account while they were independently creating an artistic program. So in this case, the artistic director became intimately involved. He designated a team from the artistic department that had to

create a script that then the artistic director had to have input on.

Amy Hand: We start with the vision, right? And then we figure out how to manage getting that vision completed.

Alan Paul: It started... Every year, we plan a gala in person, which is the biggest fundraiser of the year. And we started in probably March, probably just soon into the lock down, because it was going to be in the fall. And it takes a long time to put that together. Normally, it's a huge event with a seated dinner, a lot of performers, and there's a lot of fundraising that takes a lot of time to do.

And it began... We looked at a lot of different themes to put it together, but as the summer went on and the murder of George Floyd happened, it became clear that we wanted part of the gala, at least to focus on all the conversations we were having as a theater...

LeeAnet Noble: I hadn't even attended a Shakespeare Theatre Gala before, so this was my entryway in, but it was also connected to so many different things that were happening. As Alan was saying, not only did we have civil unrest and protesting and activism happening in our society in connection to George Floyd and Black Lives Matter, but we also have the pandemic that's taking place. And I don't think there has ever been a time in the theater history where we needed to raise as much funds. We were in such a dire moment in theater, being shut down. So the purpose of the gala is to fundraise, is to celebrate and fundraise. And this was a time where it was heightened more than ever before.

LW (11:00): From the development perspective, the challenge was, how in the world are we going to raise money, which is... We have always raised 100% of our money from major sponsorships, which are table sales, which start at \$10,000 and go up. And how do you do that when you're in essence saying, watch TV at home?

At the same time, how do we take advantage of the opportunities that this presents, because we are able to reach vast new audiences? Instead of 500 people together for one night only, we were able to reach the world, potentially, and that could have an impact not only on our reach and the reputation of the company and what we could do to serve the hunger out there, but also it could have an impact on our fundraising, and change the fundraising model.

Roger Whyte: The first conversation that we had, Laura, and correct me if I'm wrong here, but was to say, we are taking the idea of this in-person event and we're throwing it out the window. And now we're creating a TV show. And we have to think about it like that. We're creating this "special" that is a one-time only experience, and how do we pivot that for our sponsors? How do we take our sponsors that may have committed to a table sponsorship when they thought it was in person, but now it's virtual? And what are the benefits that we change to help them feel like they're still getting what they expected? And then how are we looking at it from an artistic perspective? Exactly to Laura's point, we're able to reach so many more, but we're able to reach them... so many more with a unique creative way of doing things. We aren't limited by space or time or geography. We kind of have *the world is your oyster* model. And then working with the teams there to say, "Let's look at things completely fresh," which I think was a fun experiment in how we look at those things.

LW: Yes, I think the quicker we threw out the old model, the better. And the old model was really... The artistic program, for instance, was completely organized around who we were honoring

that year. We always had an artistic honoree and a philanthropic honoree.

And one of our senses early on, as we looked at other galas, was, simply putting an in-person event online didn't work. And one of the things that stuck out to us as not working was honorees, because it's kind of an insider focus. And so if the honorees are not the generating principle for how you put together a program, what *is* the generating principle?

And I would say, when I think about the success factors of the gala, I would say one of them was, *Pick the right consultant*, which we did. And secondly, *Leverage all your internal resources*. And in our case, we have extremely high level artistic talent in our directors and our production team, and thinking about what kind of a program could they construct that would have broad meaning to a large audience and would be the best of Shakespeare Theatre rather than a typical gala.

NR (14:31): I have to say it was really a blessing when...you know, we have this little thing called *Shakespeare Everywhere*, which is something that we developed during the lockdown.

AP: We were at the very, very beginning of lockdown, and Simon Godwin, who's the Artistic Director, and Neal Racioppo, who's the Senior Director of Marketing, and I got the idea that we would ask all the actors connected with the company to record their favorite bit of Shakespeare. And we would just put it out on the internet for free, just to keep them engaged, and little pieces of entertainment for the public.

The question then became, How do we take this evening, which is multi-disciplinary and centered around some theme that had to do with us? And so we got the idea of *Shakespeare Everywhere*, because Shakespeare was everywhere. And we batted around a lot of other ideas: "Shakespeare brings the world together," and that became the theme of the night.

NR: And that grew to, Well, let's get actors from around the world.

AP: The opportunity then became for us that we could reach people around the world who could never, ever attend the gala in person. And that we had a chance to, not only reach people that knew us and liked us, that would buy a ticket, but also people that probably had never heard of us. It would be an hour or an hour and a half for them to see not only a night of entertainment, but a statement of values about who we are and what our art looks like, and what we think is important in it.

And so one of the things that we started with is, LeeAnet and I worked our connections, and we found people in over 25 countries and six continents performing Shakespeare. And we asked them, for free, just to record their favorite bit of Shakespeare. And LeeAnet found an amazing family in South Africa, people in China, India. I found people in Australia... a lot of people helped us. And it was a chance for us to really, really show that Shakespeare brings the world together, but also get people from all those countries watching.

NR: And suddenly we were incorporating videos of people from Japan and Eritrea and Micronesia, and just this whole raft of people, which really expanded our audience, because everybody participating knows people! And they all said, "Hey, I'm going to be on this thing."

AP: So when we were watching the live feed, the night of the event, people were tuning in from

Romania, Bulgaria, South Africa, Asia, Canada, Morocco...

NR: Brazil and Poland and Norway, all in a matter of seconds. It was really fantastic to feel that sort of global connection. And we were feeding comments that were coming in, into Simon, who was doing the live bits in between. It really added an energy to the night, that I think we really want to be able to replicate in the future.

KL (17:32): So it sounds like you set the direction of what you were after first. You led with mission. And then I was impressed by, essentially you guys have made a vice into a virtue. So we have to be virtual! So that means Romanians can watch. And so, who takes the next to action?

LN: As Alan and I were developing what we wanted to do, we were putting it all into script form. And it's wider... usually we're on a stage or we're in a live...we're in a live venue...and this gave us the opportunity to say, "Oh, we want to film this on the streets of DC," or, "We want to have a visual element of photos and other things included." So...and all of these things add to the cost.

And so that's when we'd turn to Amy and say, "Well, what do we have?" And Amy says, "Well, what do you want to have and what is your full fleshed out vision?" So everything was working in connection with each other, and we also had to work with development, because we need to make sure that we're putting in the right sponsors at different times in the script, and we need to make sure that we are connecting with our donors in different ways. So all of these things work together, but I think one of the most important elements, of course, was our budget and making sure that we knew everything that we wanted to happen in this gala, so we could turn to Amy and say, Here...

KL: Yeah, scope, schedule and money, right? This is the thing. How big is it going to be? How fast is it going to happen? And do we have the money? And that's the iron triangle that we have to work with here in project management.

KL (19:19): So you changed what would count as part of what we need to get done and why we're doing it, and so now we have a change in scope. How do we do the different tiers of engagement? How do we engage a lot of people? What are we going to do to tie it together? So for PMs, and I'm suggesting when you're faced with some sense of the change and you're getting ready to do a project, right? It was that willingness to change what the *why* is in part, and then the organizing principle around it.

Roger Whyte: We went through many iterations of what the model could look like. And I think that that, through a lot of collaboration, it ended up finding the perfect balance of pushing the brand, but also making sure we were raising the vital funds. We talked about, "OK, here's a possible honoree. Let's do a model where this honoree is the main focus. Now, let's do a model where this honoree is not the main focus, but they're part of it. Now let's do another model back where honoree is the main focus, and it's all about them. Now, let's do a model about..."

And it was constantly saying, how are we adjusting these things? What are we doing? What are all the elements of our virtual experience that are changing because of these new iterations of what the final event could be? And I think because we went through all those discussions and back and forth that we were able to really suss out what was the most important to this event and to the organization as a whole.

KL: What were the characteristics you look at in a model, when you talk about model this way?

RW: We were looking at the pros and the cons and the cost and the benefits...

KL: What were you using to validate that? Because it's spot on, you know, pros and cons, costs and benefits...of what? What types of things went in your model?

RW: Literally everything. Everything as small as, "What is the feasibility of a possible guest that could be a part of something like this being a part of it?" to "What is our marketing and who are we really trying to reach in this appeal? What would our donors think about this? What do our important supporters think about this? What does Joe Schmo off the street who happens to tune in think about this?" We were looking at the full 360 of every single thing, and saying... and really trying to think through what would be the pros and the cons, and the cost and the benefits?

And benefit being the biggest word. That we needed to make sure that it brought the value to the event. And I think that that was something that we spent a lot of time thinking about, is saying, "Listen, if we move forward with a model like this, where Character A is the honoree and we're structuring the event around them, let's think about the benefit. Let's think about, does it bring in viewers? Does it bring in donors, does it keep donors? Does it expand the brand, does...?" You know, we were looking at all of those things and having those conversations throughout.

LW: And one node that was a huge driver, which was timing... Can we actually accomplish it? Because we literally had about eight weeks to put this together. So Roger was often in the position of having to advise us about, as we came up with production ideas for pre-recorded material, could we pull it off in time? And how could we pull it off? And how could we do it in a way that met Covid regulations? So there were very complex calculations as a result of...of course, budget, could we afford a certain amount of recording and so forth. But also, how much time do we have to put it together and edit it and get it done?

KL: When did you know that the iteration was done? How did you guys know, OK, this is the go-model?

RW: I would say that we felt very solid about the whole thing about two weeks before. We felt like we had a grasp on all the elements. I will say that, especially in our world with projects like this, things change throughout and "things change throughout" could mean hit the cutting room floor. And there are hard... Those hard decisions where you say, This is something that is a great value, but is it as great of a value of Option B?

KL: Because you had an organizing principle, you could weigh that against it. Which is more in alignment to what we're doing here?

RW: Yeah, exactly. And making decisions to say, We have to cut this and it's going to not exist anymore, even though it's great. But it has to be cut to make the end result better.

KL (23:46): So what I'm hearing here, from a project perspective that is just fascinating to me, is what you modeled, for your classic pros and cons, which one would be the best for us, was really some deep look at your stakeholders. (We would call them stakeholders, right? You call them the super important, the different donors, the person off the street, if you will.) So it implies you did

some sort of stakeholder analysis as well. You know the different stakeholders that you had to set up for each of the different themes. It's the way you were approaching each model. This idea about looking at specific cost outlays. Clearly, you were measuring those.

I heard risk to the reliability or availability of resources. So in this model, we would want to call these people. If we call them will they serve? Will they come? And then of course, we have the classic, Can it be done? It's not enough to have a good plan if it can't actually be done. And then of course, with the virus, the whole issue was new constraints. So that's what you guys were modeling against.

Mara Mignona (24:50): So I think when we finally made the decision to go virtual, it was mid-August already... Yeah, which was just eight weeks away from the actual event. I think script writing started happening mid-August. But that's where the role of the entire company comes into play. We were in past years planning the gala just as a development department, working in a silo. But marketing helped write the script...It was tons more people involved in the gala than normal.

KL: How did you approach scheduling? Once you started hearing it's going virtual, script-writing is starting... There's going to be all this stuff. Did you build any kind of schedule or even critical path? How did you figure out what needed to be happening and did you document and share that?

Amy Hand: There was a schedule for shooting, there was a schedule for when do we need to start contracting in order to get everybody contracted on time, so that the shooting schedule stays on time. We didn't go as far as to get into a Gantt chart. We did...something I'm proud of is it's the first time we used OneDrive in a collaborative forum across our organization. So we created a document that everybody had access to, and it tracks all the things we were working on, whether it was the program and the credits that had to be included, or the shots that we had to make sure we got. The artists' contract tracker, and all of those things, were incorporated into this document that we collaboratively worked on, across departments.

MM: Yeah, so we had a timeline in place from before, when we were still planning on being in person. So we worked with lovely consultants that helped take that timeline and kind of condense it to what it should be for our virtual event. Definitely loved their help in that process, because they had been through the process of making virtual events happen, and we had not done that quite yet.

KL: How did you start interacting as the different parts got brought in?

MM: I think a lot of the things that were on the timeline were conversations that had to be had, just because they were new things. So maybe Create a Marketing Plan was part of that timeline, but we had never done that for a free gala before, so a lot of it was scheduling meetings to take things to the next step.

KL: Did you have to integrate what the different people were doing, to say this step has to happen so that I have the information for this? Or when this gets in place, this will help this be in place. Did you have that dependency look at all?

MM: I think a lot of the people involved with the gala were involved in many different aspects of it, so I found that a lot of the times, some of these smaller meetings weren't as effective. We were having these big group meetings, with 20 people. It seemed like our whole company was involved

in a lot of the meetings. But when you're in a space where everyone can share, and you get the information that all the departments are contributing to the gala, I think people were really benefiting.

KL: That's really interesting. I think that's counter-intuitive to a lot of what we get trained on, which is like, why are so many people in the meeting? It's slowing every process down. Often. But that's really interesting to me that you found in this critical time crunch the way to do that. And it sounds like it's because you have people collaborating from all the sides, so that they're actually collaborating... They need to be in the meeting.

Laura Willumsen: And I think, when I say that it leveraged all of our internal resources, in the past, the gala was seen as a development event that the artistic department had to provide talent for and the production department had to put on. This completely changed the approach, so that it was a completely non-siloed event, where the gala team was all on board. Everyone's on board. So the marketing team was involved, the finance and contracting side, the artistic side, the production side... And all had input as we were putting this on because this became a Shakespeare Theatre production.

KL: Given that so many people were collaborating and there was so much change going on, what was your observation or your management, either one, of communications? Making sure that all the different parts... when something had moved here, that that was being communicated.

MM: Yeah, I think that goes back really to that big large meeting that we were having once a week. It feels weird to say, we were sitting in this big meeting with 20 people, but it was so productive and it really held us accountable for moving things forward, just to have an update every week and make sure we're following the timeline. That meeting was where we checked in to make sure things were happening.

LW (29:35): Marketing was a critical partner because we were now reaching out well beyond sponsors in order to engage eyeballs. We wanted maximum number of people coming. And it was for a free event! So one of the challenges we had in development was, how do you promote sponsorship, ask people to pay \$10,000 to attend the event and say it's free? And then how to channel those different messages through marketing and development?

So marketing not only ended up having a lot of input and impact, by using their resources of our weekly newsletter, our social media. They created materials for us that we were able to distribute to participants and board members and so forth, who could send to their networks very easily. They also actually... the marketing director actually helped write the script, and came up with the beginning act, with Simon as a bell hop that was extremely entertaining and effective. So in terms of hidden talent... Yeah, he had never had any involvement in the gala before. And there it was, he had some very big impact on the ultimate program.

KL: I think that's something for teams to realize, that you have cross-functionality that can happen, particularly if you're in a time of change.

KL (31:06): This was intriguing as a fundraiser, because it was free. As the professionals whose job is to bring in essentially the non-ticket sales money, you're told the big one for the year, we're going to do it. It's going to be weird, it's going to be new, it's going to be different. How we do it is

different, the platform we do is different and actually we're even changing the mission. It's going to be a little bit about reach, not just about the donor dollars. How did you feel about addressing, "I'm here to raise money in a free event?"

LW: Yeah, part of what I did immediately was try to think of it in terms of a free program for the public that we had people paying for. And these people could sit at our virtual tables and enjoy it and get sponsorship credit. But in fact, what we were putting on was a free program for the public. So that was where the virtual just created an entirely different possibility in terms of how we were thinking about this program.

And so I said to the artistic team very early on, "I want something *great* like you can do. So this is not the old format, this is a program that puts Shakespeare Theatre out in the world, and you need to do the magic." The sponsors... Really, I think with this little bit of time and with all the uncertainty of Covid, we really focused on our closest circle. And therefore I could spend a lot of time with board members and so forth, explaining what we were up to and helping them understand what the benefits were.

So from the very beginning, we were kind of looking on a dual track. We were looking at the sponsor track and trying to make sure that was as robust as possible in terms of their experience. And we were looking at the public track, about how to maximize the benefit of a really terrific program in reaching the public. And then of course, to the degree that could be turned into some fundraising with a new audience, that was a great opportunity that we wanted to leverage as well.

LW (33:20): When I say that it was important that we had a great consultant, I mean it. Because Roger and his team had had experience with other virtual galas, we could gauge what we needed to offer. Because if you think of it purely in terms of dollars, we might be spending \$200 a plate for a fancy sit-down dinner for our regular sponsors at a regular gala. But what if we provide a box dinner that costs \$100 or less, and is delivered, but it's kind of fun and has some thematic elements to it? And so forth.

They were able to give us a lot of advice about, Yes, you can do that. So we had some confidence about that. We also, when you look hard at a problem like this, you can see, Okay, sponsors are... One of the problems with the gala is that sponsors get recognition one night only, and it's only if somebody opens the program book and sees their ad. Whereas here, if we do a good job on marketing and we put our sponsors on the virtual program, they have a lot more of an opportunity to be seen. So that actually becomes a positive thing for someone like a corporate sponsor. Not so much for individuals, but for corporate. And then a critical issue that really was new for us as well, and again, we got a lot of good counsel from Roger and his team to go this way, but it took a lot of convincing internally because it cost money, was upgrading technology.

So the investments that we made, and I would single out one in particular, which was to provide branded virtual private rooms for sponsors was key to our success. And we didn't know that would be the case, but it just sounded like it was something that would at least be a greater benefit than just saying, "Hey, I'm sponsoring this event. You want to turn it on to YouTube at 7 o'clock?" That didn't seem so great. So this allowed us to say, "You can invite your friends and they can sit comfortably and safely in their homes. We'll deliver dinner to them, and together with your 10 or 15 people, you can experience this gala together. You'll have some time for visiting. We'll have somebody come and visit your room, and then you can watch the gala together on the screen in the

branded room.”

So it was more sophisticated than Zoom, and it cost a lot of money. And that, in our current budget situation, that was very difficult to justify. But it turned out to be a key success factor. For instance, in our onsite fundraising, we were able to raise \$150,000 in Text-to-Give donations during the program, which was phenomenal and key to our success. But two of those donations equaled half of that total. One gift of \$25,000, and one gift of \$50,000, and they were both from guests at sponsored tables who had no affiliation with the theater.

KL (36:39): So for my PMs here, I just heard that it's about *make the investment*. Particularly if you have to do something new. Whether it's the technology upgrade, that's actually going to drive value. It's not about convenience. It's about, because by spending the money here, you unleash the ability to get this other money, which was consistent with your mission.

LW: The huge risk was we wouldn't make our budget. The sponsorship revenue that we typically got was 100% of our revenue. And by the time that we started changing from selling sponsorships to pushing out free program marketing, we had... That was the final two weeks before the gala, we had raised two-thirds of our goal. And so that was done. But the unknown was that remaining third. And the remaining third relied entirely on fundraising during the event, both the Text-to-Give and the silent auction, which was... We did a major silent auction, and we had never done anything like it before.

But one of the keys was, how many people were actually going to show up to watch it? Because if you only have 10 people watching it, you're not going to hit that goal. So marketing became a risk factor. And we're used to having 500 people at the gala. By the end, we had 13,000 views around the world. So if we defined success early on, we would have said 2,000 people and maybe 3,000 people is a stretch goal. But to have 13,000 views was amazing.

And many, many, many people gave small amounts, but they gave small amounts in a program that did not focus on fundraising. The program itself – and this was another risk factor that was really interesting, I think – which was the program was set up without a lot of focus on fundraising, and in fact, it was an object of anxiety for me to the very end, as Roger knows. Where are the intervals where we're going to do fundraising? What is the pitch, and is there enough time to get momentum for people to actually give money? And we worked out our best case scenario trying to work fundraising in, but it was not the primary focus on site.

The primary focus on site was the quality of the program. And that was a big risk, but in fact, what happened was the quality of the program, the program... And you were there, so you can attest to this, the program was so moving that even though we had modest amounts of time focused on fundraising, people responded warmly. And so we were able to raise a significant amount of money on site, and that was really the huge risk.

KL: Quality matters. In fact, the focus on quality, rather than just getting the outcome or the output, is what drove its own success there, I think. Because you did have the quality. It wasn't a production., you were *in* production. You weren't being performed *to*, you were part of getting to observe the theme of Shakespeare Everywhere.

Neal Racioppo (39:49): There were some other arts organizations that went out before us, and had

some missteps that we were able to learn from. We were able to look at some of those and think, "Okay, I really like what they did there. I don't want to do that." Our initial plan for the night was almost half an hour longer, and we were able to really think about that and create a night that moved, right? It was really exciting. We were able at times to make what would be normally liabilities to become advantages. So, "Oh, we can't get a major star to travel to our theater. Oh! But maybe that person could do a five-minute video from wherever they are." And that's where we were able to... "Oh, we're not going to have one major star, we're going to have 40 major stars. This is incredible!"

So just re-thinking how to work with the parameters that are set before you and being willing to adapt and not stick to what worked last time.

KL: So what did it shift in your marketing as you're trying to tell people about a free event?

NR: In terms of marketing that... Yeah, we had to get people used to the idea of how to do this. If we're on Facebook Live and we're on YouTube, it takes away all of the hardware issues that people will have, or software issues. They can just turn it on. It'll just be easier for them. And so that was really important to us. That's where we got the idea of thinking, Oh, if we make it free, we get the eyeballs, we're able to tell donors, "No, this isn't being seen by 700 people, it's being seen by 10,000 people." And how fantastic is that?

It did allow us into some media that we're normally not in, because it's a free event. Everyone, again, is stuck at home, and for us to say, "Hey, here is an hour's worth of entertainment that you can enjoy from anywhere if you have an internet connection," was exciting. To blow open the idea of, it's not a black tie affair, and you have to know somebody to get in.

This is for the community, and the community being the entire world. That's a really exciting message, and one that I think we're hoping to continue to replicate, right? We love the idea of anyone being able to get into our theater, and now we can do that for real through the internet.

KL (42:21): Was it successful? And in what ways?

LeeAnet Noble: We wanted to do so much. And honestly, everything made it in, and that's really the amazing part. That we were able to have Simon, there live, to really drive the fundraising element. We were able to put little inklings of what could be coming up in the next season, which we didn't really know, because we didn't know when theater was going to be able to re-open again. And then we were able to go back in history and uncover stories that had never been told about black actors, and we were able to connect with artists from all around the world. And we were able to work with celebrities on a level that we had never done before in the history of the theater.

So that's another element, that some of the celebrities that we worked with had like four lawyers and five agents, and these are huge movie stars, and we had never been able to have that level of celebrity work with our theater. And so many dreams came true creatively for us, because everything made it, made it in. And then the responses...

So the really cool part was, when I wasn't going live or anything like that, I just sat in the theater and just was able to read the comments, and people saying that they were moved and that they were crying and this really helped them, and they were laughing and they were seeing some of their

favorite celebrities, and they felt this sense of comfort in a time where it's rare right now. I think that alone made it successful.

We also met our goals fundraising-wise, but the fact that so many people were touched and we were seeing people in South Africa and people all around the world sitting and watching this piece, and seeing that they were moved by it and it comforted them, I think that that's what we wanted. We wanted theater to serve its purpose, that it always has, as a healing mechanism, as a way to connect people.

KL: You met scope, you met mission and you met the budget.

KL (44:44): What was the most difficult thing you faced as a person in your role, executing this project?

Amy Hand: For me, it was timeline. Although there was a lot of care taken, and that needed to be taken, in creating the script and making sure the vision was there. And so we didn't start contracting until August 25th. That's when the first offers went out for the gala. We had three weeks to contract 45 artists, so that was a feat.

KL: So what was the lesson you got yourself, just from where you're sitting? What's a lesson you learned from this?

AH: Well, my lesson is, is to muscle into the process a little sooner.

KL: Every project manager's lament! I should have started sooner!

Mara Mignona: Yeah, I think for me, my biggest hurdle to get over was accepting that we were going to have to change the event and do something virtually, which is the first step, so it shouldn't have been the hardest thing, but I think for me it was. And I kept putting off saying we need to pivot to virtual, and kept hoping that things would open, and things would be safe for us to gather again. But I think going forward, I need to plan that second alternative plan as well, then put a date in my timeline to say, "This is when we're going to pivot, this is when we're going to make that decision." So that I'm not just continuously putting it off until it's too late.

KL: An internal flag to get on board with the program, huh? Why do you think you didn't want to pivot?

MM: Change is difficult, for sure. And it meant creating new processes, thinking about things in new ways, and that's difficult for a lot of people. And nobody knew what a virtual event looks like. It was going to be all new, everything was thrown up in the air. It was going to be hard.

Alan Paul: The hardest thing is, LeeAnet and I put together an 80-minute gala that talks about the moment. And then you have this huge thing, and it's overwhelming to narrow it down into something manageable and deliverable, because it could be anything. And I think the success of it came... #1, We were operating under the mission of the theater; but #2, LeeAnet and I created a very specific outline that was going to be a program that discussed the past, the present and the future of the American Theater and our legacy.

And so it was a case of like, you can't write an essay if you don't take the time to do an outline. It takes forever, but if you have a great outline and a thesis, you can knock it out. And so we had a very short amount of time to do it, but we were so clear about *why* we were doing it, that the *what* came easy. And even the things that did not materialize, we could find a solution because we knew *why*. And that went on every single level of this.

I learned in the process, especially with celebrities, be incredibly specific about what you want. The more specific you are in your ask to them, the more detailed and intimate response you will get from them. So just, "Record your favorite Shakespeare," wasn't going to work. We asked them very specific things, and that's why we got what we got.

KL: Nietzsche said, I think, "If you know your *why* you can endure any *what*." So I like the idea that you were saying about really think through your mission and your outline, and that's project management planning in a lot of ways.

And you also said something I'll highlight to project managers. We don't all get to work with very fancy celebrities. But we all have very powerful senior stakeholders in any serious project we have that has a lot of money in it, and so there's a great lesson right there: That's good, but when you engage with them, be specific. Be *very* specific.

KL (48:27): What is the lesson that you have... At least one lesson you're taking from your professional role that you will take as a lesson? Something you'll have to handle in the future or something you'll remember in the future...

NR: I think the number one lesson I would take away from it is remembering that nothing is too precious. We were able to... There were things that we've never done differently, why would we change? Oh, you know what? We're going to change! It's okay. Things aren't going to fall to pieces just because you're not doing it the way you did it the year before. It's okay to adapt.

MM: It created a new opportunity to re-brand our gala as something that's more theatrical. I mean, in the past, we had just focused on awardees, and the performance was kind of like a mish-mash of different dance performances and skits, and it just was a big cabaret situation. But to now have the gala be more of a theatrical performance really opened up the road to start involving more people in the company and putting Shakespeare Theatre Company's name out there. So I think it was a great opportunity to now change the gala. But it was a good change.

LeeAnet Noble: What I took from it is the way that we are able to move in the moment. This was something that was... That we could have never expected. And we could have never really prepared. Nobody... We didn't have film production teams set up waiting in the corner for a pandemic to happen. And so I think I connect to the part... what I learned most was how resilient we can be as creative people and people in the theater in times like these...

NR: So I have to go back to Judy Garland and Mickey Rooney. It felt like, "Hey, let's put on a show. We don't know how we're going to do it, but my aunt's got a barn and I can make the costumes, and OK, we're going to make this worldwide global event. How do we do that?"

And we did it by working together and by sparking ideas off of each other that we normally wouldn't have had access to. And if I may – just from a personal point of view – we're in lockdown,

we're not going to work, we're not leaving our homes... Being able to see and communicate with that many people at that time was actually wonderful. I think this far in, we're all a little more zoomed out right now. Like, No, no, not another meeting where I need to look at 14 people! But at that time, it was really a bit of a tonic to be able to see everybody and have that connection with them that we normally wouldn't have.

KL: Your very work is creative, so it's interesting to hear because you have to be creative in this case, right? In terms of the management, execution, the...again, the messier stuff. So we would hope you guys are really naturally adaptive.

Roger Whyte: Yeah, I think what was a benefit to us, even in our initial conversations with Laura and the team, we were very clear on what we can do. And I think that that was a big benefit when there was so much volatility and change. Having someone where the client will trust them and listen to them is vitally important. And I think that in this situation, it was amazing, because the client, even though it was our first year working with them, they did trust us. And in working with other clients when there isn't that level of trust, there is a noticeable difference in the end result.

AP: It's like you do in a play, but it has to do, I think with project management and agility. You have intentions for what you want the project to be on paper, and then you have to reckon with what it is. So we thought we were walking into Wednesday with the final draft, and when we saw it together, it was clear, seeing it, that it could be better. It could be shorter. And those are the things you don't know until you're actually confronted with the truth of what you thought, and you have to deal with the fact that what you created is different than what you thought. And you have to be really mentally flexible and agile and not personalize a huge amount of changes at the end, which is difficult if you have your heart set on things. But I think what LeeAnet and I were really disciplined about was going, "I don't think we're going to miss it if we cut five minutes here. I don't think we're going to..." You have to be ruthless with yourself, so that what you give the audience, the final product, is the simplest, cleanest version of it. Your intentions don't matter. What matters is what shows up on the screen.

KL (53:31): What will never be the same? That we've taken away?

MM: I mean, in previous galas, we had a 500-person dinner at the National Building Museum, and people walked two blocks over to the Harmon and sat in the theater and watched a performance. And that in-person dinner with 500 people was so expensive, and I don't think that's something that we can go back and do exactly that same way again. It's just not realistic for our budget.

LN: I know that as a result of this gala and seeing what we could do, that from here on out, it will be accessible in different ways to a wider audience.

LW: I would say personally, I never want to go back to the old model. I never want to spend all the time and energy that we spend on an annual gala to serve 500 people. We need to operate in a way that maximizes the impact of what we do and gets it out to as many people as possible in the most cost-effective way, so that people can take great joy out of what we do.

AP: I would also say that we have all changed. And what we look for in an arts organization, we want them... We're looking closely to see what their values are. So who we are and what we do, have to be aligned. You can't say you're one thing and then present something else to the world, and

so I think this was a step in a really holistic conversation about our values and our mission, and that will continue forward in an un-questioned way, is my hope and belief.

KL: So the pandemic has brought us a new model, a new way of seeing something.

NR: And I think our philosophy has changed. The idea that this is a special event that is only meant for a few special people, and you have to know somebody who knows somebody, you have to write a big check in order to participate. No. This is an event for the world. We want everyone, as many people as possible, to see it and feel like they're part of it. That was I think the big eye-opener for us. That we can connect with people who have seen our work and know us; and we can connect with people who may never have the opportunity to walk into our theater, because they live in South Africa or Greenland or whatever. To open our arms wider was really exciting, and I hope we never lose that.

KL (55:58): So a bittersweet tale. Bitter, because, as of this recording, the theaters are still dark. But as far as the team delivering on their mission? *Sweet are the uses of adversity*. Team Gala at STC figured it out, and expanded their reach to audiences, and created a whole new product. The outreach exceeded their expectations. They were able to incorporate important fresh messages of inclusiveness and the healing power of theater. And they reached their fundraising goal.

The stage will not be dark forever.

With the short time frame, their clarity of mission was essential. The vision was their road map, the foundation of the script for action. By knowing their *why*, that framed their *what* that they would do. And what role collaboration? This was a huge part of their success, from the agile-like cross-functional stand-ups to the use of collaborative workspace. They were all willing to try new things, and to jump into any role that was needed. In such a fast-paced, fluid situation, big group meetings turned out to be the hot ticket for ideation and the challenging of ideas. In a time of contraction, they were able to expand in previously un-imagined ways.

With so much uncertainty ahead, projects like this are inspiring. And as I edit this, from a PM Point of View, I'm suddenly surprised at my realization that the two biggest take-aways for me came from each of the co-directors, Alan and LeeAnet. (When was the last time art professionals gave you a project management pointer?) In times of crisis, in times of change, when you have to deliver with quality, on time, on budget, "Nothing is too precious," and, "Move in the moment."

Special thanks to my guests: Amy Hand, Mara Mignona, LeeAnet Noble, Alan Paul, Neil Racioppo, Roger Whyte and Laura Williamsen.

Announcer: Our theme music was composed by Molly Flannery, used with permission. Additional original music by Gary Fieldman, Rich Greenblatt, Lionel Lyles and Hiroaki Honshuku. Post-production performed at M Powered Strategies.

KL: And now a programming announcement: We will start transitioning our format here at PM Point of View®, starting with a test run in May. I have invited many-time guest Mike Hannan to co-host episodes, where we will discuss a PM topic, invite a guest for a part of the show, and if you submit them, give you our take on PM questions you may have. So, submit questions to me on LinkedIn in the next three weeks, and we may tackle it right on the show...or invite someone who

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can! I look forward to hearing from you and hope you enjoy our looser, more conversational format. We'll keep it all at an hour, so you can learn lots and get PDU's. See you online!

PMPs who have listened to this complete podcast may submit a PDU claim, one PDU, in the talent triangle, Strategic & Business Management, with the Project Management Institute's CCR system. Be sure to manually enter provider code number 4634 and select M Powered Strategies, and manually enter the name of the episode. PMPOV0085 Covid and the Art of Fundraising: A Theatre's Tale.

Visit our Facebook page, PM Point of View®, to comment and to listen to more episodes and get the transcripts. Evaluate us on iTunes if you like what you're hearing, and send me comments and questions on LinkedIn.

I'm your host, Kendal Lott, and as always, keep it in scope and get it done.

Announcer: This has been a Final Milestone Production sponsored by M Powered Strategies.