

HUDSON
VALLEY
SHAKESPEARE
FESTIVAL

The Circle of HVSF

HVSF STRATEGIC PLAN
EXECUTIVE SUMMARY

2017-2021

“
To see Shakespeare performed at
Boscobel under a magenta-streaked
sky on a balmy night is as satisfying an
experience as outdoor theater affords.

THE WALL STREET JOURNAL, 2016

”



DEAR FRIENDS,

Seen from above, in its setting by the Thames, Shakespeare's own theater was a large circle that drew into its circumference all sorts of people, and brought to life within it an astonishing diversity of stories. Shakespeare and his fellow company members called it "The Globe" not just because it was round, but because it was conceived to be a theater of radical inclusivity; its purpose was to encompass the whole world.

In developing a Strategic Plan for HVSF, Managing Director Kate Liberman and I see Shakespeare as both our inspiration and our touchstone. The plan represents an ambitious yet responsible vision for the evolution of HVSF, focused on deepening our engagement with the community in the Mid-Hudson Valley while at the same time repositioning our Company as a destination theater in the unique context of the New York City metropolitan area. Central to this vision is the addition of a second, smaller performance venue, which we envision to be mobile, multi-purpose, and... circular in shape.

Mark Rylance, the first Artistic Director of Shakespeare's Globe in London, was recently quoted in *The New York Times* as follows:

"If you can make a circle, even in a proscenium theater, if you can get a circular energy going, so that all these people are involved with it and present, then there is something curious that happens with the imagination. And I swear, as a performer, you get ideas from the collective, from the audience..."

This sense of shared playfulness between actors and audience, of collective (and often spontaneous) creativity is fundamental to our work at HVSF. It's at the heart of all that we do, and all that we are. It is also an apt description of the collaborative process that has given birth to this plan, through extended conversations with Board, staff, artists, community leaders, colleagues in the theater field, supporters, and fans. Kate and I are deeply grateful to all for their energetic participation, and honored to have them as part of the extended circle of HVSF.

Warmly,

Davis

Davis McCallum, Artistic Director





MISSION

The Hudson Valley Shakespeare Festival engages the widest possible audience in a fresh conversation about what is essential in Shakespeare's plays.

Our theater lives in the here and now, at the intersection between the virtuosity of the actor, the imagination of the audience, and the inspiration of the text.

WHO WE ARE

In the summer of 2017, the Hudson Valley Shakespeare Festival (HVSF) presented our 31st Season, featuring five productions playing in rotating repertory under our iconic open-air tent on the grounds of Boscobel House and Gardens in Garrison, NY.

In recent years, the Company has also ventured beyond the tent, touring our work to other venues throughout the Hudson Valley through **HVSF On The Road**, transferring productions to other theaters, and presenting small-scale works in local venues during the winter months. Attendance rose steadily for 10 seasons beginning in 2004, leveling off to a range of 32,000 to 35,000 over the past three years. HVSF was named among *The New York Times*' 50 Essential Summer Festivals in 2016, was Hudson Valley Magazine's 2016 Editors' Pick for Best Summer Theater, and was nominated for a Drama League Award for its 2015 production of *A MIDSUMMER NIGHT'S DREAM*. Running in parallel, HVSF's extensive Education Program annually reaches over 50,000 students at more than 50 schools in the tri-state area through touring productions, in-school residencies and workshops, professional training, and a summer camp. With an annual budget of over \$3 million, HVSF employs 10 year-round staff members and 100+ seasonal staff and artists every year.

VISION

On August 11, 2016, *New York Times* theater critic Charles Isherwood wrote: "Strange but true: To experience the pleasure of traditional repertory theater on a significant scale — to watch actors perform multiple roles in different plays over the course of a few days — you would have to leave the two epicenters of English-speaking theater, New York and London. Here in North America, you would need to travel to the Oregon Shakespeare Festival in Ashland or the Stratford or Shaw Festivals in Canada to watch actors with deep experience in the classics perform them in rotating repertory."

In considering our long-term future, we have identified this gap as a huge strategic opportunity for our theater. We envision a future for the Hudson Valley Shakespeare Festival in which we are:



1
SECURE IN OUR RESIDENCY AT BOSCOBEL, AND IN OUR FLAGSHIP VENUE: THE TENT

We prize the irreverence and uniqueness of the Tent, and the breathtaking environment at Boscobel, and remain committed to both in the coming years. We know that our location is beloved by both artists and audiences. In order to plan responsibly for the future, to contemplate the growth proposed in this plan, as well as the fundraising required to implement it, we must demonstrate long-term security of our partnership with our colleagues at Boscobel.



2
A VIBRANT, NATIONAL DESTINATION FOR AMERICAN SHAKESPEARE, JUST 50 MILES FROM NYC

By expanding our offerings to include a wider variety of work, with both matinee and evening performances in rotating repertory, we envision two venues of complementary sizes, to allow us to attract audiences from further afield, repositioning HVSF as a true destination theater. Such an expansion will require significant investments in fundraising and marketing, and in the long run, partnerships with local leaders to encourage the infrastructure necessary to support overnight tourism in the Hudson Highlands.



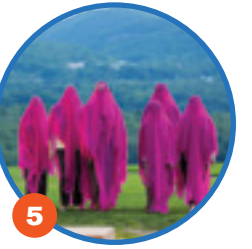
3
MORE THAN A SUMMER THEATER, WE ARE A YEAR-ROUND CULTURAL ANCHOR FOR OUR COMMUNITY

Building on the overwhelming response to our 2016 production of *OUR TOWN*, HVSF has developed a new Community Engagement department, reflecting a movement in the theater field that the Irvine foundation has called a "seismic shift toward a participatory arts culture." This kind of Community Engagement opens pathways to participation for individuals who might otherwise see barriers between themselves and live theater. As we look ahead, when the winter months make performing outdoors in our Tent impossible, these programs represent our deepest commitment to the HVSF mission of engaging "the widest possible audience."



4
DEEPLY ROOTED IN THE PLACE OF THE HUDSON VALLEY

Our location in the Hudson Valley is of the essence, and increasingly should inform our programming. We recently launched a multi-year series, called *HVStories*, in which each season we include programming that celebrates the history, nature, culture, and people of the Hudson Valley. The possibilities here are exciting, from a oral-history project resurrecting the memory of Guinan's on Garrison Landing, to a piece about the life and work of Pete Seeger, to a grand new theatrical adaptation of *Rip Van Winkle*.



5
PROGRAMMING OF THE HIGHEST ARTISTIC QUALITY, AS DIVERSE AND AMBITIOUS AS IT IS POPULAR

With Shakespeare as our inspiration, we aim to create work that appeals to a wide variety of audiences. We know that our artistic vitality is tied to our ability to take risks, to challenge ourselves and our audience to join us in an ever-evolving pursuit of the essence of Shakespeare. To continue to thrive artistically, we must offer our audiences a diverse body of work by Shakespeare as well as by other writers — work that is challenging, playful, irreverent, relevant, exuberant, timeless.

SEVEN STRATEGIC PRIORITIES

At the core of our planning process is the commitment to retaining the nimbleness and pragmatism that have long characterized Hudson Valley Shakespeare Festival. This plan does not re-invent HVSF, it strives to build on the festival's current strengths and make them sustainable, artistically and financially.

To that end, over the next five years, HVSF will focus on seven strategic priorities:



A SECURE FOUNDATION

Move from current short-term lease to a sustainable, long-term tenancy with Boscobel House and Gardens. This would include an agreement that is mutually beneficial, advances the missions of both organizations, and ensures that HVSF has a secure and stable home to realize its artistic and strategic priorities.



BUILDING ARTISTIC QUALITY

Develop and enhance the quality of the HVSF experience by investing in artists, expanding the season, and diversifying our offerings.



BUILDING COMMUNITY

Connect HVSF more fully with Hudson Valley residents through Community Engagement, Arts in Education, and Professional Training for our Conservatory Company, Interns and Teaching Artists.



BUILDING THE BRAND AND AUDIENCE

Establish HVSF's identity as a vibrant national center for American Shakespeare deeply rooted in the Hudson Valley, while diversifying and growing HVSF's annual audience base by 33% over five years.



BUILDING THE FUNDING BASE

Ensure institutional financial stability and the funding necessary to support the artistic, educational, operational and infrastructural strategic priorities of this plan for HVSF, now and in the future.



BUILDING PHYSICAL CAPACITY

Create and maintain performance and support spaces that align with HVSF's aesthetic; support an expanded performance schedule, broadened repertoire and artistic risk-taking; better serve our constituencies through education and engagement; and provide opportunities for audience and revenue growth.



BUILDING ORGANIZATIONAL CAPACITY

Increase organizational capacity to realize the artistic vision, organizational mission and strategic priorities as laid out in this plan.





THE CASE FOR A SECOND VENUE

One of the cornerstones of this vision for Hudson Valley Shakespeare Festival's future is the creation of a flexible second performance venue. Like The Tent, the second venue would appear at Boscobel in the spring and leave the site in the fall. However, in many other respects it would be complimentary to the tent.

- **MOSTLY INDOORS**, it would allow us to play matinees and extend performances into the autumn months.
- **AS A MOBILE SPACE**, it would facilitate and broaden our Education and Engagement programming throughout the year allowing us to perform at other sites throughout the region.
- **WITH 200 TO 250 SEATS**, it would be roughly half the size of The Tent, which would allow HVSF to program a richer, more varied artistic season.
- **A THEATER IN-THE-ROUND**, it would be one of the most unique and exciting venues for Shakespeare in the country.

The investment that HVSF would make in this additional venue is not in bricks and mortar, but in a highly functional and nimble tool that will allow the company to better pursue our mission and the vision of this strategic plan. With a second venue, HVSF would:

- **RAISE ARTISTIC QUALITY** by altering the repertory structure, allowing us to attract and retain the best talent, and allowing us to produce each play in the optimal performance context (i.e. in the round for 250 or in our thrust under The Tent for 540);
- **ENRICH THE AUDIENCE EXPERIENCE** by offering a more diverse slate of artistic experiences in a 72-hour window, thus increasing the draw for destination audiences;
- **ALLOW FOR A WIDER VARIETY** of on-campus Education and Audience Enrichment offerings, including expanding the HVSF2 reading series, Summer Camp, post-show Talkbacks, Friday Night Prologues, Brown Bag Lunches, Teacher Training, Poetry Night, Conservatory Company rehearsals, etc.;
- **DOUBLE THE NUMBER** of paid performances, by adding both matinee and evening performances in the summer, as well as school matinees in May and September;
- **BOLSTER OUR INSTITUTIONAL BRAND** as the first American company to feature this kind of pop-up venue, and one of the few Shakespeare theaters in the country with an in-the-round space;
- **PROVIDE AN ADDITIONAL INDOOR SPACE** to our partners at Boscobel that could be used for weddings and conferences;
- **PIONEER A MOBILE ARCHITECTURAL PLATFORM** to bring theater and theater-making to people throughout the Hudson Valley through Education and Community Engagement programs all year round.



THE NUMBERS

This vision for expansion at Hudson Valley Shakespeare Festival will require a strengthened financial and organizational foundation. To that end, over the five years of this plan, HVSF will seek:

- **TO GROW TICKET SALES** by improving the audience buying experience, defining and enhancing the HVSF brand, conducting outreach to new buyers, taking advantage of the growth in our region, and boosting local partnerships.
- **TO INCREASE OUR FUNDRAISING BASE** by growing the size of the HVSF board, boosting our corporate sponsorship program, expanding our donor pool, and increasing participation in the HVSF Festival Circles program via moves management.

As a result of the initiatives in this plan, from FY2017 to FY2021, HVSF expects to see:



TOTAL EXPENSES INCREASE
from \$3.00M to \$4.84M



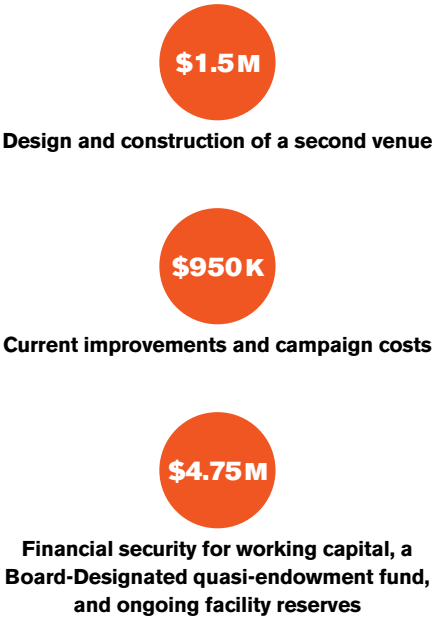
CONTRIBUTED REVENUE GROWTH
from \$1.40M to \$2.36M



EARNED REVENUE GROWTH
from \$1.58M to \$2.56M

CAMPAIGN 2020

THE PROPOSED \$7.2 MILLION TO BE RAISED BY CAMPAIGN 2020 WILL BE DEVOTED TO THE FOLLOWING THREE AREAS:




As a core part of the plan, following demonstrated success in increased annual giving and ticket sales, combined with a positive feasibility study, HVSF will launch a three-pronged campaign called **Campaign 2020**.

CAMPAIGN 2020 AT A GLANCE

CAMPAIGN REVENUE STREAMS			CAMPAIGN REQUIREMENTS		
\$8,000,000					
\$7,000,000	\$600,000	Bequests	\$600,000	Campaign Costs	
\$6,000,000	\$800,000	Government	\$1,000,000	Ongoing Maintenance	
\$5,000,000	\$2,500,000	Foundations	\$3,000,000	Designated Quasi-Endowment	
\$4,000,000	\$100,000	Corporate			
\$3,000,000	\$1,600,000	Individual	\$750,000	Working Capital	
\$2,000,000			\$1,500,000	Second Venue	
\$1,000,000	\$1,600,000	Board	\$350,000	Facility Improvements	
\$0.00					

Please help Hudson Valley Shakespeare Festival achieve this vision



**FOR A COPY OF THE COMPLETE
HVSF 2017-2021 STRATEGIC PLAN,
PLEASE CONTACT**

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**HUDSON VALLEY SHAKESPEARE FESTIVAL
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