

BALLET FANTASTIQUE

STRATEGIC PLAN
2013–2016



Dancers of Ballet Fantastique take a bow before an outreach Q&A with kids at the Hult Center after *Arabian Nights* (2012). Photo: Greg Burns

SECTION 1

Vision, Mission, Values

Vision

A leading voice in contemporary ballet, Ballet Fantastique will be recognized throughout the Northwest and beyond for its creation and performance of all-original contemporary ballets, marked by the hallmarks of fresh perspective, dramatic artistry, and collaborative partnership. These performance programs will attract, inspire, and retain new and nontraditional audiences for dance. Ballet Fantastique's training and outreach programs will reach across barriers in access to educate the next generation of artists and audiences.

Mission

Ballet Fantastique reimagines the future of dance—building new dance audiences through contemporary ballet premieres, training the next generation of artists, and inspiring youth through visionary outreach programs.

Values

WE WILL:

- Celebrate diversity and work inclusively
- Communicate openly and deal objectively with issues
- Demonstrate our commitment to openness and trust in all professional relationships
- Promote a supportive atmosphere of tolerance, respect, inclusion, sensitivity, and humor
- Act with integrity, sincerity, accountability, and professionalism
- Collaborate within and beyond the organization
- Strive for excellence and continuous quality improvement
- Take pride in our work
- Act as advocates for dance

SECTION 2

Executive Summary



DONNA MARISA +
HANNAH BONTRAGER
DIRECTORS
BALLET FANTASTIQUE {BFAN}

Choreographer-Producers Donna Marisa & Hannah Bontrager at center with dancers of Ballet Fantastique after *Danse en Rouge* (2009). Photo: Anne Nunn

Three years can bring big change.

Three years ago, a grant from the Meyer Memorial Trust, community donations, tireless volunteers, and a dedicated staff enabled BFan to triple its square footage with the opening of our new City Center for Dance—a move that also successfully tripled our budget and programs in fewer than 36 months. Based in the heart of Eugene’s developing downtown Arts & Culture District, BFan now thrives 350 days/yr with the work of creating new choreography, educating dancers, and fostering cross-disciplinary collaboration.

BFan’s growth has always rested on our fiercely creative frugality, a committed corps of 100+ volunteers (contributing thousands of hrs/yr), and generous in-kind donations (~\$50,000/yr at present). Academy enrollment and concert ticket sales unquestioningly prove program relevance—and establish the need to grow (e.g., current Academy classes are 75–100% full; and the Company’s last 3 consecutive performances sold out, earning box office revenues exceeding those of companies with twice BFan’s budget). These strong earned income streams have propelled our organization’s striking budget growth (60–90%/year, despite the recent recession). We operate within our means and boast a 100% debt-free history.

Now, 2013 inaugurates an era of marked new growth opportunity for Ballet Fantastique as we envision what the next three years can hold. In summer 2014, BFan will become the first new Resident Company of the Hult Center for the Performing Arts in over a decade, successfully completing a stringent three-yr application process and joining the

coterie of the Eugene Symphony, Oregon Bach Festival, Eugene Ballet, and three other distinguished groups. And in the next 36 months, BFan plans to premiere nine new full-length contemporary ballets (all with live music; three with original scores), produce six new youth shows, and field two international touring invitations (Italy July 2013; Trinidad July 2015). Furthermore, there is growing demand for us to expand class and performance offerings, scholarships, and outreach work. And audiences in Portland, Medford, and the Oregon Coast are asking the Company to return for repeat performance appearances; these touring invitations represent important opportunities to attract and build new, wider audience bases with BFan’s unique brand of *ballet like you’ve never seen it before*.

Yet in spite of the exciting growth opportunity on the horizon, BFan finds itself at a transformative crossroads where growth can either continue or stagnate in the next three years: current capacity is maximized and current staff are stretched too thin to take on new cultural or educational programming in response to existing need and interest. Strategic planning is always important, but for BFan’s next three years, it’s critical, or the organization will stagnate. And so, BFan’s Board and artistic leadership—with valuable input from Academy families and Company artists—have worked to create this strategic plan to ensure that BFan continues to thrive **and grow sustainably** for the benefit of the 15,000+ young artists and non-traditional audiences we serve across the Northwest each year. We invite you to join us as we embark on this exciting journey. Here’s our road map.

Donna Marisa Hannah Bontrager

This plan builds on the strengths and values of BFan and provides a platform for the future of BFan's programs, its faculty and staff, its community, and its financial stability through enhanced marketing and development efforts.

The implementation of this plan will depend upon the continued support and involvement of the communities BFan serves.



Dancer Alanna Fisher in the studio
Photo: Jared Mills

SECTION 3

Strategic Aims

{ BIG GOALS }

Out of these mission and vision statements, Ballet Fantastique's key strategic aims in the next three years are to:

BFan is proud that it has undertaken this major planning process, thereby taking a significant step toward ensuring sustainability and the future of our important work across the Northwest and beyond. It is our goal that this strategic plan will guide forthcoming growth to create lasting, continued success for the next phase of Ballet Fantastique's cultural and educational programming. Each of the strategic activities planned and outlined on the following pages contributes to one or more of the following "Big Picture" goals at right.

- 3.1 GOVERNANCE:** Ballet Fantastique will position itself for the next period of growth as we become a sustainable mid-sized arts organization. BFan will ensure our long-term viability as a non-profit dance organization empowered to fulfill our important and unique mission.

- 3.2 FUNDED RESIDENT COMPANY:** Ballet Fantastique will achieve Hult Center Resident Company status and will successfully attain (and subsequently, retain) Hult/Silva endowment eligibility.

- 3.3 INFRASTRUCTURE:** As a service business, employees are the single most important asset for executing BFan's mission. In the next three years, Ballet Fantastique will increase our investment in current staff, increase supports and oversight for interns and volunteers, and add faculty, staff, and personnel as needed to strengthen our organization's administrative and artistic capacity, including the vital positions of Marketing/Development Director, Development & Communications Associate, and Grant Writer.

- 3.4 BUILDING COMMUNITY:** Ballet Fantastique will continue to grow our awareness of community needs—and respond to these needs.

- 3.5 MARKETING:** Ballet Fantastique will effectively market itself for growth.

- 3.6 AUDIENCE-BUILDING:** Ballet Fantastique will attract and retain a dedicated, engaged, and growing audience for company performances: specifically, BFan will grow season subscriptions, individual ticket sales, and out-of-area ticket sales.

- 3.7 EXPANDED TOURING PROFILE:** Ballet Fantastique will expand our touring profile and increase touring invitations, both nationally and internationally. Specifically, BFan will participate in multiple presented performances/year, regular international touring, and will perform regularly in targeted communities outside of Lane County.

- 3.8 LEADING TRAINING ACADEMY IN THE NORTHWEST:** The Academy of Ballet Fantastique will become recognized as a leading training program in the Northwest. Specifically, BFan will build academy enrollment, grow the Summer Intensive Program, grow support programs (e.g., Apprentice/Trainee and Teacher Training Programs), and expand class offerings as needed to meet growing demand.

- 3.9 OUTREACH:** Ballet Fantastique will grow current outreach programs in response to existing need, and initiate other new programs as needed to meet increasing interest.

- 3.10 DEVELOPMENT & CAPACITY:** Ballet Fantastique will ensure that we have a firm foundation for our future by strengthening relations with funders and developing and implementing both short- and long-term development strategies. This increase in resources will allow greater operational independence—planning and performing without limitations. BFan will grow our programs and operations budget to \$450,000+ annually by the 15–16 fiscal year.

Dancer Ashley Bontrager with a young fan in the Hult lobby after *Cinderella: A Rock Opera Ballet* (2012). Band members Shelley James and Rica Weber in background.



3.1 GOVERNANCE: Ballet Fantastique will position itself for the next period of growth as we become a sustainable mid-sized arts organization. BFan will ensure our long-term viability as a non-profit dance organization empowered to fulfill our important and unique mission.

To achieve this goal, Ballet Fantastique will:

Steps	Objective + Need	Strategies
<p>Board of Directors and Advisory Board</p>	<p>OBJECTIVE: Ballet Fantastique will expand and diversify its Board of Directors and Advisory Board. It will ensure that the organization continues to be governed by an energized, informed team that provides BFan with the resources it needs to grow and fulfill its mission.</p> <p>NEED: To accomplish all of the goals established in this Strategic Plan, Ballet Fantastique needs an expanded, even more diverse Board of Directors. We realize that our governance and Board leadership must evolve and grow to effectively support our increasingly larger and more complex operations. BFan needs to add new Board members to its committed existing governing team—individuals passionate about our mission, who can bring new resources and networks to support our growth.</p>	<ul style="list-style-type: none"> • Continue to have a diverse and active Board of Directors that will provide strong leadership in policy, governance, and fundraising. • Continue to hold monthly Board meetings/annual Board retreat. Ensure that Board members are receiving consistent and comprehensive orientation and training, which will include the following topics: cultural competency, speaking points re: Ballet Fantastique, fundraising/resource development, program evaluation, community assessments, communications, and financial oversight responsibilities. • Increase the number and diversity of Board members through enhanced recruitment efforts, including targeting well-qualified new members to apply for Board membership. The Executive Committee will create a list of Board needs and leads, and designate current Board members and/or staff to meet and follow through with these leads. The Board will vote on new memberships as applications are received. • Create infrastructure for Board members to oversee volunteer member committees (i.e. Conference Committee, Marketing Committee, Fundraising Committee, etc.).



Left: Ballet Fantastique dancer Amanda Coleman in “Cinquenta Anos de Soledad” to an original score by Charles Gurke at the Hult Center (premiere 2010) Right: Ballet Fantastique dancer Leanne Mizzoni with guest artists Alonzo Moore (Dancing People Company) and Goh Shibata (Eugene Ballet) in “Love at the Cafe Terrace” at the Hult Center (premiere 2009). Background: Composer Jeremy Schropp’s 25-part orchestra. Choreography: Donna Marisa and Hannah Bontrager. Photos: Jared Mills

<p><i>Succession Plan/ Strategic Planning</i></p>	<p>OBJECTIVE: Ballet Fantastique will guide the organization’s future through thoughtful Strategic Planning that sustainably balances realistic growth with BFan’s characteristic tenacity—and ambitious fulfillment of our mission and vision. Also paving the way for successful strategic growth, we will create an organizational Succession Plan.</p> <p>NEED: BFan needs to have a Road Map for its future growth. With clearly-defined goals in a comprehensive Strategic Plan, we will be positioned for focused, successful growth. And with a strong Succession Plan, BFan can ensure smooth transitions of leadership and responsibility to capable and experienced parties.</p>	<ul style="list-style-type: none"> • Regularly evaluate BFan’s ability to meet designated Indicators of Accomplishment on a quarterly basis. • Alter strategies and activities as necessary; changes will be documented through approved Strategic Plan revisions and/or Board minutes; committees and work groups will monitor progress and report to the Board on a quarterly basis. • Schedule annual Strategic Planning meetings in preparation for the upcoming fiscal year (July 1–June 30), when the Strategic Plan will be amended as necessary. The revised Strategic Plan will be adopted by the Board prior to July 1 annually, and redistributed to all Board and staff members, as well as to key partners and funders. • Develop a formal Succession Plan for all key staff positions. • Develop and begin to implement a Resource Development Plan, including raising the funds needed for the new staff positions (see “Infrastructure,” Section 3.3).
<p><i>Policies and Procedures</i></p>	<p>OBJECTIVE: Ballet Fantastique will codify and continue to update our financial, governing, and other key procedures.</p> <p>NEED: BFan needs these codified policies to guide our ongoing and future operations with efficiency, consistency, and integrity, and to continue to build institutional memory.</p>	<ul style="list-style-type: none"> • By June 1, 2013: Finalize all updated policies in the Ballet Fantastique Financial Policies and Procedures Manual; thereafter, continue to update as needed. • By July 1, 2014: Update Ballet Fantastique’s Statement of Financial Development and Position, with emphasis on progress in fundraising efforts, cash management, budget growth, income sources, and use of funds. Post statement online for use on grant applications and for greater transparency. • Annually, beginning July 1, 2014: Prepare for an annual external Financial Audit as required by the Hult/Silva Endowment panel. Ensure that our Guidestar is up to date for transparency. • Ongoing: Continue to review bylaws for current relevancy and update as needed (last update December 2012). • Set a regular faculty, company dancer, and staff meetings schedules to enhance communication among key employee participants as BFan grows. • Create a Faculty Handbook; update Company and Academy Handbooks as needed.

3.2 FUNDED RESIDENT COMPANY: Ballet Fantastique will achieve Hult Center Resident Company status beginning in the 14–15 season and will successfully attain (and subsequently, retain) Hult/Silva endowment eligibility beginning with the 15–16 season.

To achieve this goal, Ballet Fantastique will:

Steps	Objective + Need	Strategies
<p><i>Hult Center Resident Company status</i></p>	<p>OBJECTIVE: Ballet Fantastique will become a Hult Center Resident Company by meeting or exceeding all residency requirements (see the bulleted list below).</p> <p>NEED: In 2010, BFan designated its primary strategic goal for the period of 2011–2014 to become a Hult Center Resident Company for reasons of expanding our reach, building regional caché, and compelling our organization’s growth and artistic ambition. This stringent three-year process will be complete May 15, 2014.</p> <p>Hult Center Resident Company Requirements:</p> <ul style="list-style-type: none"> • Demonstrate recognized artistic excellence through attendance, reviews, and financial support, e.g., grants, endowments, awards. • Be an Oregon-based non-profit organization with a 501(c)(3) status for at least three years of continuous existence as a performing arts organization in Eugene. • Have a local/community-based Board of Directors. • For the most recent three seasons, market a subscription season or a multiple-event season in the Hult Center consisting of at least three different productions and a total of six performances. • Meet the established required minimum earned Patron User Fee (PUF): \$4,000 for Soreng residency (2,000 seats sold/season). • Promptly pay costs of using the Hult Center so that all current debts are cleared on or before June 30 of each fiscal year; pay all Resident Company artists and performers. 	<ul style="list-style-type: none"> • By May 5, 2014: Complete the 13/14 season with strong ticket sales (BFan has met or exceeded all other stated requirements). • By May 10, 2014: Complete the Resident Company Application and Portfolio (critical articles and reviews, final numbers, list of Board members, performance photographs, etc.); submit to Karm Hagedorn and the City of Eugene panel for consideration and anticipated approval.

<p><i>Hult and Silva Endowment eligibility and funding</i></p>	<p>OBJECTIVE: Ballet Fantastique will be invited to apply for—and earn—Hult and Silva Endowment funding by meeting or exceeding all endowment requirements (see the bulleted list below).</p> <p>NEED: Hult and Silva Endowment funding will make a significant impact on Ballet Fantastique, providing vital funding for both operating functions and the Company’s innovative performance premieres.</p> <p>Hult/Silva Endowment Eligibility Requirements:</p> <ul style="list-style-type: none"> • 501(c)(3) status. • Minimum expense budget of \$200,000 and demonstrated evidence of proper financial stewardship. • Audited financial statements. • Lane County base of operation. • Have at least two years of continual operation and have demonstrated a reasonable likelihood of continued performing activity. • Represent traditional art forms and have demonstrated professional intent, as evidenced by artistic standards and artists’ compensation. • Use the Hult Center for performances. • Have demonstrated significant community impact that provides broadly based and sizable constituencies with regular professional artistic programs. • Have achieved a level of quality and proficiency sufficient to perform for critical review. 	<ul style="list-style-type: none"> • By June 30, 2014: Complete the 13/14 FY with strong budget growth. • By June 15, 2014: Contract the CPA providing the most economical bid on an external audit of the 13/14 FY. • Beginning October 2014 and annually thereafter: Craft and submit strong, well-written grant applications for panel consideration. • As needed: Ensure panel awareness of BFan’s eligibility; answer any questions or requests for additional information. (BFan has met or exceeded all other requirements at left).
<p><i>Continue to successfully meet above-stated requirements in BFan’s future</i></p>	<p>OBJECTIVE: Continue to maintain Resident Company status endowment eligibility, season after season (see below).</p> <p>NEED: BFan needs to maintain these statuses in order to solidify our presence in the performance communities of Eugene and the greater Northwest.</p> <ul style="list-style-type: none"> • Provide at least one annual youth outreach event. • Recognize the Hult Center in program books, seasonal brochures, and print advertising. • By December 1, annually: Submit to the Hult Center a calendar of events for the following season. • By June 1, annually: Submit to the Hult Center an annual report summarizing achievement of residency qualifications and includes economic impact data for all events that take place at the Hult Center. 	<ul style="list-style-type: none"> • Continue to develop, contract, and codify innovative performance plans for future seasons. • By December 1, annually: Submit the required calendar of Hult Center events. • Beginning October 1, 2014 and annually thereafter: Craft and submit strong, well-written grant applications for panel consideration. • By June 1, annually: Maintain portfolio of artistic accomplishment, progress in earned income, and audience development (including diversity; as required at left); submit to the Hult Center. • As needed: Ensure panel awareness of BFan’s eligibility; answer any questions or requests for additional information.

3.3 INFRASTRUCTURE: As a service business, employees are the single most important asset for executing BFan’s mission. In the next three years, Ballet Fantastique will increase our investment in our current staff, increase supports and oversight for interns and volunteers, and add faculty, staff, and personnel as needed to strengthen our organization’s administrative and artistic capacity.

To achieve this goal, Ballet Fantastique will:

Steps	Objective + Need	Strategies
<i>Increase investment in current staff</i>	<p>OBJECTIVE: Ballet Fantastique will direct adequate funding to appropriate employee-focused programs, especially for the key artistic staff of company dancers, teachers, and leadership.</p> <p>NEED: Ballet Fantastique needs to retain high-quality employees in order to be viable and competitive with other arts organizations in the region and beyond, and in order to effectively fulfill our mission and vision.</p>	<ul style="list-style-type: none"> • Compensation and benefits: Implement a competitive Compensation and Benefits Program, given available resources. • Professional development: Subsidize and encourage employee participation in professional development programs and opportunities. • Performance evaluation: Develop an appropriate and systematic employee performance and evaluation process.
<i>Increase supports and oversight for interns and volunteers</i>	<p>OBJECTIVE: Ballet Fantastique will increase supports and oversight for our interns and volunteers.</p> <p>NEED: BFan needs to harness and more effectively direct these important personnel resources.</p>	<ul style="list-style-type: none"> • Create a Statement of Personnel/Delegation Road Map, strategically designating which ongoing BFan tasks will be directed towards volunteers, towards interns, and towards our permanent staff (e.g., Office Manager). • Create a protocol for volunteer coordination and recognition (including sending a regular volunteer email newsletter, organizing existing volunteer contact lists, etc.). • Train a permanent staff person (e.g., the Office Manager) to take on these ongoing Volunteer Coordination responsibilities. • For responsibilities that will be assigned to interns, BFan will continue to develop and revise job descriptions and protocols to support institutional memory.

<p>Grow administrative staff</p>	<p>OBJECTIVE: Ballet Fantastique will grow our administrative staff as soon as possible and by FY 15/16 at the latest (positions under consideration include Outreach & Marketing Coordinator, Development Director/Assistant, Grant Writer, Facilities Manager, etc.).</p> <p>NEED: Since its inception, BFan has been supported by the passion and skills of its volunteers, both artistically and administratively. However, dancers, college interns, and other community volunteers are still filling most key staff roles. Moreover, the ED still wears too many hats, which keeps her from fully leveraging her skills—and creates a major risk for our organization should there ever be a need to replace her. Critically-needed new staff will bolster BFan’s internal capacity, institutional memory, and ability to sustainably generate revenue.</p>	<ul style="list-style-type: none"> • Develop Job Descriptions for all positions. • Begin to aggressively source capacity-building grant support for these new positions. • Identify a Selection Committee, to include 1–3 Board members and Ballet Fantastique’s leadership; this Selection Committee will refine and define qualities for competitive candidates. • Undertake a national job search for the Marketing & Development Director and an area search for the other new positions. • Hire and contract highly qualified individuals for the positions. • ONGOING: Evaluation and sustainability planning.
<p>Grow artistic staff</p>	<p>OBJECTIVE: Ballet Fantastique will add one additional male soloist dancer to the Company’s roster by FY 13/14 and an additional dancer by FY 15/16. BFan will also consider additional investment in other artistic support staff, including contracted light design and videography.</p> <p>NEED: These new dancers will bolster BFan’s capacity to maximize earned income in the form of paid touring performance appearances as well as supporting the artistic process, freeing the Company from a tenuous reliance on guest artists (with uncertain schedules) to perform key leading roles. Other new artistic personnel will enhance Ballet Fantastique’s ability to produce and market original high-quality contemporary ballets.</p>	<ul style="list-style-type: none"> • Winter 2013: Identify a Selection Committee, to include 1–3 Board members and BFan’s artistic leadership. Selection Committee to refine and define qualities for competitive candidates. • Winter 2013: Undertake national audition search, including postings in <i>Pointe</i>, <i>Dance</i>, and <i>Dance Spirit Magazines</i>, posting the position on the Ballet Fantastique website, and distributing employment notices to major training programs across the US (Executive Director Hannah Bontrager, with Ballet Fantastique’s intern team). • Spring 2013: Hire and contract a highly qualified male dancer for 30 weeks of paid performance work, to include Hult Center “home” productions as well as touring programming. In addition to participation in Company events, the artist’s contract will include the instruction of at least one Academy class, and participation in at least one in-school Outreach program. • September 3, 2013: New male soloist begins first week of work with Ballet Fantastique. • Evaluation and sustainability planning. • For FY 15–16 dancer: Repeat the above. • For other artistic personnel, as needed: Refer to the Artistic and Executive Directors for desired skill sets and qualifications.

3.4 BUILDING COMMUNITY: Ballet Fantastique will continue to grow our awareness of community needs—and respond to these needs.

To achieve this goal, Ballet Fantastique will:

Steps	Objective + Need	Strategies
<p>Community-Building</p>	<p>OBJECTIVE: Ballet Fantastique recognizes that 1) We are a community and that 2) We serve the community. We will provide community programming that leverages and expands our established programs and create new programs to meet growing need and interest.</p> <p>NEED: To ensure the long-term vitality and relevance of our programs, we must develop our relationships with our communities, understand our communities’ needs, and actively communicate with these communities.</p>	<p>As a community:</p> <ul style="list-style-type: none"> • Improve and codify communication with families, subscribers, members, dancers, etc. so that they clearly understand the scope of Ballet Fantastique’s mission and our values. • Strengthen and expand volunteer organization and provide even more opportunities throughout Ballet Fantastique for individuals to become more fully engaged in our organization’s work. • Strengthen cross-collaborations between BFan Academy programs (including Young Dancer, Conservatory, Adult, and Community Divisions). <p>Serving our community:</p> <ul style="list-style-type: none"> • Develop a Statement of Educational Programming. • New programming: Consider offering an in-studio performance series to the public, and a reduced-price family concert series to reach new audiences. • Develop new series of community participation and outreach programs to meet other areas of community need and interest; provide education programs both targeted at students and open to the general public (see “Outreach,” Section 3.9).



3.5 **MARKETING:** Ballet Fantastique will effectively market itself for growth.

To achieve this goal, Ballet Fantastique will:

Steps	Objective + Need	Strategies
Marketing	<p>OBJECTIVE: Develop an overall, coordinated marketing and communications plan.</p> <p>NEED: Ballet Fantastique has extensive existing marketing and communications activities, each supporting our organization’s programs and constituencies. We need to ensure that our marketing and communications grow in tandem with organizational growth—and continue to be effective.</p>	<ul style="list-style-type: none"> • Review current marketing and communications activities to evaluate effectiveness. • Solicit regular feedback from Ballet Fantastique’s constituencies. • Identify the competitive differences among dance programs and activities in our market area. • Create a comprehensive Marketing Plan. • Develop materials that clearly and compellingly articulate BFan’s purpose, role in, and contribution to the communities we serve.
	<p>OBJECTIVE: Trademark “Ballet like you’ve never seen it before.”</p> <p>NEED: Ballet Fantastique needs to protect its unique niche descriptor.</p>	<ul style="list-style-type: none"> • Research trademark process. • Secure trademark.

Academy of Ballet Fantastique student dancers Camille Morgenstern and Tommy Newman in a Ballet Fantastique in-studio demonstration (2010). Choreography: Donna Marisa and Hannah Bontrager. Photo: Reathel Geary



3.6 AUDIENCE-BUILDING: Ballet Fantastique will attract and retain a dedicated, engaged, and growing audience for company performances: specifically, BFan will grow season subscriptions, individual ticket sales, and out-of-area ticket sales.

To achieve this goal, Ballet Fantastique will:

Steps	Objective + Need	Strategies
<p>Season Subscribers and grow new ones</p>	<p>OBJECTIVE: Ballet Fantastique will retain our existing subscribers—increasing their sense of loyalty and “value for money” perception. BFan will also grow new subscribers, ambitiously increasing our overall season subscriber base to 200 for the 13/14 season, to 275 by the 14/15 season, and to 350 by the 15/16 season.</p> <p>NEED: Season subscribers are BFan’s most important ticket holders. They provide a consistent, dependable base of support and are current and prospective donors.</p>	<ul style="list-style-type: none"> • Retain existing subscribers through the creation and implementation of a Subscriber Relationship Management Plan, including: <ol style="list-style-type: none"> 1. Developing a timeline for subscriber relations. 2. Sending regular relationship-building materials (e.g., holiday thank you card). 3. Expanding special subscriber benefits (e.g., discounts to local restaurants and hotels, discounted season gala tickets, etc.). 4. Hosting special subscriber-/sponsor-only events (e.g., on-stage champagne toast on opening night, Summer Soirée). 5. Devise and implement regular subscriber surveys to benchmark satisfaction levels, awareness levels, and perceptions of BFan. 6. Integrate feedback as appropriate. • Build new subscriptions through subscription marketing activities, including: <ol style="list-style-type: none"> 1. Develop and implement a multi-faceted Subscription Marketing Plan, including scheduling mail and email communications and other promotions more strategically, targeting individuals who regularly attend performances as single ticket purchasers, emphasizing season subscription value, etc. 2. Consider restructuring or adding additional performances to the subscription series to attract new subscribers, including a discounted Friday Night Family Series Subscription Package.



Dancers Leanne Mizzoni as Kitty Bennette and Justin Feimster as Mr. Bingley in Ballet Fantastique's *Pride & Prejudice: A Parisian Jazz Ballet* premiere (2013). Choreography: Donna Marisa and Hannah Bontrager.
Photo: Stephanie Urso

<p><i>Individual ticket purchases for each production</i></p>	<p>OBJECTIVE: Ballet Fantastique will increase individual ticket purchases, regularly selling out shows and establishing the need to add a third performance to the Hult Center “home” season by season 15/16.</p> <p>NEED: Ballet Fantastique’s audience members empower and inspire our artistic work. With a growing audience, we prove interest and relevance for our art. Furthermore, single ticket purchasers can be targeted and cultivated into season subscribers, and increased ticket sales help to compensate BFan’s artists.</p>	<ul style="list-style-type: none"> • Initiate a comprehensive audience survey to ascertain who our “typical” current single ticket purchaser is. • Develop and implement a Group Sales Action Plan (integrate constituent research into this plan). • Work closely with Travel Lane County and other area marketing groups to source and leverage additional and new networks and opportunities. • Continue to participate in community events where dancers perform previews of works in progress to generate interest for upcoming premieres (e.g., March of Dimes, Travel Lane County, Relief Nursery, etc.).
<p><i>New Audiences in New Communities</i></p>	<p>OBJECTIVE: Ballet Fantastique will begin to build a regular audience base in new, targeted communities.</p> <p>NEED: Ballet Fantastique needs to grow its audience base to expand our reach and to establish a precedent for expanded touring.</p>	<ul style="list-style-type: none"> • Build audiences in targeted communities (see “Expanded Touring Profile,” Section 3.7).



Dancer Hannah Bontrager as Henriette and guest artist Elijah Labay (Northwest Dance Project) as Casanova in Ballet Fantastique’s *Misadventures of Casanova* premiere (2013).
 Choreography: Donna Marisa and Hannah Bontrager.
 Photo: J. Robert Williams

3.7 EXPANDED TOURING PROFILE: Ballet Fantastique will expand our touring profile and increase touring invitations, both nationally and internationally. Specifically, BFan will participate in 2–3 presented performances/year, regular international performances, and will perform regularly in targeted communities outside of Lane County.

To achieve this goal, Ballet Fantastique will:

Steps	Objective + Need	Strategies
<i>Overall Touring Infrastructure and Marketing</i>	<p>OBJECTIVE: Ballet Fantastique will develop infrastructure and marketing collateral (including print, online, email, etc.) for all tour-able original productions.</p> <p>NEED: As of the 13/14 season, Ballet Fantastique has amassed a formidable roster of original productions that are highly suited to tour—salient opportunities to earn caché, develop new audiences, and maximize the Company’s initial investment (because there are no creation, production, or marketing costs, net revenue from touring invitations is relatively high). Ballet Fantastique needs to develop the infrastructure and marketing collateral to share this original repertoire with interested presenters and theaters.</p>	<ul style="list-style-type: none"> • Create an annual Touring Communications/Marketing Plan and Timeline. • Update online resources. • Develop portfolio of materials to send to prospective presenting arts groups and theaters.
<i>Expand National Touring</i>	<p>OBJECTIVE: Ballet Fantastique will scout, source, and cultivate relationships with past, future, and potential presenters and theaters across the U.S. Ballet Fantastique will earn between 2–3 paid, presented, contracted touring appearances each season.</p> <p>NEED: In addition to generating new earned income for the organization, touring across the U.S. will also support BFan’s mission by attracting, building, and retaining wider audiences through the Company’s unique brand of accessible, innovative contemporary ballet.</p>	<ul style="list-style-type: none"> • Identify and target national targets/leads. • Continue to develop the leads in the Ballet Fantastique Presenters Database. Follow the Touring Communications/Marketing Plan and Timeline, as created above. • Plan ahead for participation in Arts Northwest each season. • Consider participation in larger conferences (e.g., APAP and WAA, Arts Midwest, etc.). • Consider working with a booking agent. • Design and publish a Ballet Fantastique calendar for inclusion in booking conference presenter bags. • Maintain relationships with past presenters and strong leads (e.g., Everett Community College, the Oregon Shakespeare Festival, Seacoast Entertainment, etc.).

<p>International Touring</p>	<p>OBJECTIVE: Ballet Fantastique will earn at least one international touring invitation each year.</p> <p>NEED: Performing internationally, BFan will represent the artistic vitality of our Northwest home and build even wider, international audiences for dance—earning cache among local audiences and funders in the process.</p>	<ul style="list-style-type: none"> • Successfully undertake and execute the Italy Tour 2013 (<i>As You Like It: A Wild West Ballet</i>). • Successfully undertake and execute the Trinidad Tour 2015 (<i>Cinderella: A Rock Opera Ballet</i>). • Build a list of festival leads and initiate contact. Follow the Touring Communications/Marketing Plan and Timeline, as created above. • Continue to research special funding opportunities for international touring (e.g., US Artists International grant).
<p>Oregon audiences (e.g., Medford/Ashland, Portland, and the Oregon Coast)</p>	<p>OBJECTIVE: Ballet Fantastique will begin to perform regularly in nearby communities.</p> <p>NEED: BFan pours thousands of hours and dollars into developing all-original contemporary ballet premieres—then performs them just 2–3 times at the Hult Center in Eugene. By performing regularly in these nearby communities (including Medford/Ashland, Portland, and the Oregon Coast) in addition to each Hult Center premiere, BFan will expand its impact, serve wider audiences, and earn additional income with which it can further compensate its Company artists.</p>	<ul style="list-style-type: none"> • Begin to tour regularly in the targeted communities designated at left (at least one performance per year in each city beginning in 14/15 season; then moving to 3+ performances/year in each city in the 15/16 season). • Source new audience members through targeted partnerships with complementary groups in the area. • Build relationships with new audience members and area groups (e.g., White Bird Dance in Portland, area dance schools in each community, etc.). • Further: Target other Oregon/Northwest communities (e.g., Seattle) with regular performance appearances.



Dancer Ashley Bontrager as the Genie with Adam Haaga as the Brother in Ballet Fantastique's *Arabian Nights* premiere (2012).
Choreography: Donna Marisa and Hannah Bontrager.
Photo: J. Robert Williams

3.8

LEADING TRAINING ACADEMY IN THE NORTHWEST: The Academy of Ballet Fantastique will become recognized as a leading training program in the Northwest. Specifically, BFan will build academy enrollment, grow the summer intensive program, grow support programs (e.g., Apprentice and Teacher Training programs), and expand class offerings as needed to meet growing demand.

To achieve this goal, Ballet Fantastique will:

Steps	Objective + Need	Strategies
Visibility: Overall Awareness/Recognition	<p>OBJECTIVE: Ballet Fantastique will build awareness and recognition.</p> <p>NEED: Increased visibility and awareness will allow Ballet Fantastique to reach and serve a wider community with our unique training approach.</p>	<ul style="list-style-type: none"> • Initiate current student survey and other data collection measures to create a prospective student profile. • Undertake a SWOT (Strengths-Weaknesses-Opportunities-Threats) analysis. • Build an Academy Marketing Plan integrating this information, including both local and regional components. • Increase studio signage to capitalize on extensive foot traffic for both studios. • Develop and enlarge our program of dance classes and summer intensive workshops nationally; address and engage with the needs of the community (e.g., more adult recreational classes responding to additional interest from the new downtown LCC center, etc.); see below.
Curriculum	<p>OBJECTIVE: Expand and diversify current classes and support systems offered.</p> <p>NEED: BFan wants to ensure that students achieve the maximum benefit from and appreciation of the art of dance—appropriate to their individual needs, abilities, and objectives.</p>	<ul style="list-style-type: none"> • Utilize our teachers’ diverse backgrounds to offer a more diverse array of classes for multiple levels (e.g., Pilates, Contemporary). • Survey students annually to ascertain interest levels in new class offerings. • Educate families about the benefits of exposing their dancer to a wider range of styles. • Continue to develop the Adult Program, offering more styles and levels (e.g., Adult Intermediate, Pointe, etc.). • Expand health and wellness program (e.g., nutrition, kinesiology, etc.) • Develop materials for senior students to use as a post-graduate resume. • Develop career counseling and resources to better mentor young professional dancers. • Enhance cross-level student mentoring opportunities.

<p>Academy Enrollment</p>	<p>OBJECTIVE: Ballet Fantastique will grow and maintain a stable pyramid of 200—300 students impacted per year through Academy programs.</p> <p>NEED: BFan needs to expand our impact with our passion and knowledge for dance education and focused, accelerated training approach. Ballet Fantastique will grow our Academy sustainably way via three major vehicles: 1) Educating current families as a means of increasing student retention, class enrollment, and commitment; 2) Marketing more extensively to potential families; and 3) More strategically responding to leads.</p>	<ul style="list-style-type: none"> • Develop procedures for obtaining and evaluating regular feedback from internal and external constituencies for each program. • Retain existing current families: Building class enrollment, loyalty, and involvement: <ol style="list-style-type: none"> 1. Offer trial discounts to current students for new classes outside current students' immediate training area (e.g., Contemporary and CORE Sculpt). 2. Involve families more extensively in volunteering. 3. Host special team-building events exclusively for current students (e.g., Ballet Movie Night, etc.). 4. Host more regular meetings encouraging information and communication (e.g., Fall Back Into Dance meeting, Summer Intensive Orientation). 5. Involve parents and families in studio learning: Host formal Parent Viewing Weeks twice annually; make dancers feel excited about their learning progress. • More strategically respond to leads: <ol style="list-style-type: none"> 1. Create materials targeted at students/families trying a class for the first time (e.g., Welcome Brochure). 2. Create additional marketing materials designed to educate parents of prospective students about selecting movement and dance programs as well as promote the specific strengths of The Academy of Ballet Fantastique. 3. Continue to welcome students from other dance schools who want to pursue serious dance instruction within our program and syllabus. • Create opportunities for word-of-mouth prospecting: <ol style="list-style-type: none"> 1. Create additional prospective student informational events (e.g., Open House, Bring a Friend Week). 2. Better publicize referral rewards program. 3. Explore new programs to increase diversity. 4. Consider building/nationally marketing a more rigorous Apprentice Program and a Teacher Training Program.
<p>Summer Intensive Program</p>	<p>OBJECTIVE: Increase visibility and enrollment.</p> <p>NEED: By offering a more prestigious summer program, our organization can provide all levels of students with the opportunity to work intensively in the Vaganova style and while attracting new students to our Academy.</p>	<ul style="list-style-type: none"> • Plan Summer Intensive Program schedules and programming well in advance to allow additional marketing potential. • Market Summer Intensives nationally in <i>Dance</i>, <i>Pointe</i>, and <i>Dance Spirit</i> magazines. • Explore housing options for out-of-area students to make the Program more marketable to a wider range of participants. • Host a summer performance in quality and scope to attract more students. • Consider hosting a choreographic workshop and offering outdoor summer concerts in different venues. • Consider offering a formal teacher training workshop to teachers from across the US.

3.9 OUTREACH: Ballet Fantastique will grow current outreach programs in response to existing need, and initiate other new programs as needed to meet increasing interest.

To achieve this goal, Ballet Fantastique will:

Steps	Objective + Need	Strategies
Expand existing programs	<p>OBJECTIVE: Grow both EXPERIENCE DANCE! and Passport to Dance programs.</p> <p>NEED: Ballet Fantastique needs to expand on the highly successful model of our existing programs in order to give more children the opportunity to have meaningful learning experiences with dance.</p>	<ul style="list-style-type: none"> • Develop new relationships with educators to engage and involve more schools in current programs. • Expand on existing relationships. • Source funding to subsidize bus transportation for Passport to Dance schools so that lack of funding does not prevent Title I and at-risk children’s ability to participate. • Continue to source funding to keep programs free to participating schools.
Build new programs	<p>OBJECTIVE: Grow the new RISE Boys Dance Lab, bringing in talented, at-risk boys from surrounding areas of Lane county to teach them about dance, discipline and body awareness.</p> <p>NEED: Ballet is constantly in need of male dancers and Ballet Fantastique wants to educate and develop the next generation of male dancers.</p>	<ul style="list-style-type: none"> • RISE Boys’ Dance Lab: <ol style="list-style-type: none"> 1. Identify participants: The new RISE Boys’ Dance Lab is an extension of the EXPERIENCE DANCE! Project. This hands-on, experiential program is especially crafted for at-risk male students at the middle school levels and teaches these youth about dance, exercise, nutrition, body awareness, teamwork, and self-discipline. The goal of RISE: Boys’ Dance Lab is to provide these boys with the experiences they need to become interested in dance and, by extension, allow them to focus their energies toward not just a great form of exercise, but the thought processes, resilience and dedication that it takes to make things happen both on the dance floor and in their own lives. This project expands upon Ballet Fantastique’s highly successful existing model to meet new areas of identified need and will be offered to schools in predominantly low-income areas where boys are at a documented risk for poor grades, under-achievement and suspensions. 2. Scholarship class: Host bi-weekly full scholarship pre-professional dance classes for participants who show interest and aptitude. These 15-20 students will come into BFar’s downtown City Center for Dance to study with a professional male dancer-teacher (and mentor). 3. Residency Program: Conduct a residency program within the school for 10 weeks (the scholarship class will run for an additional five months of the school year). 4. Evaluation: Evaluate the program with extensive survey materials; gage its effectiveness. 5. Support: Source resources to continue the program. • Other new programs: <ol style="list-style-type: none"> 1. Develop additional new programs to address need. 2. Ensure that new programs have clearly-defined purposes, scope, priorities, and strategies.

3.10 DEVELOPMENT & CAPACITY: Ballet Fantastique will ensure that we have a firm foundation for our future by strengthening relations with funders and developing and implementing both short- and long-term development strategies. This increase in resources will allow greater operational independence for BFan to plan, create, and perform without limitations. BFan will grow our programs and operations budget to \$450,000+ annually by FY 15/16.

To achieve this goal, Ballet Fantastique will:

Steps	Objective + Need	Strategies
<p>Contributed Income</p>	<p>OBJECTIVE: Increase the amount of contributed income from grants, corporate sponsors, individual donors, endowments, and fundraising events. For Ballet Fantastique to continue to grow at the pace that it has over the last three years, we need to increase the amount of contributed income and events to a healthier 35% (from the current 15–20%).</p> <p>NEED: We recognize the depth and vision of BFan’s work, transcending dance and connecting with new artists and audiences. Ballet Fantastique has many areas of heretofore unrealized potential in contributed income. We need to develop these new sources of additional contributed revenue (and further cultivate existing sources) in order to build BFan’s capacity to create new work, engage company members in a more paid full time fashion, and further develop our educational programs.</p>	<ul style="list-style-type: none"> • Overall strategy: Create a strong infrastructure and overall development strategy. <ol style="list-style-type: none"> 1. Hire key administrative/capacity-building development staff (see “Infrastructure,” Section 3.3). 2. Work with new staff to create an annual Development Calendar and Plan, which, together with the Marketing Plan (see “Marketing,” Section 3.5) and Resource Development Plan (see “Governance,” Section 3.1), will further maximize sources of both earned and contributed income. 3. Begin to use donor management software; train team members and establish clear responsibilities and update protocols. • Individual donations: Cultivate new donors and significantly increase individual donations. <ol style="list-style-type: none"> 1. Maintain and strengthen relationships with current donors and grant sources. 2. Identify and cultivate new funders. 3. Increase the overall level of parent giving and augment parent participation in fundraising; strengthen connections with alumni, alumni families, and grandparents. 4. Further explore community resources. 5. Increase the overall level of season subscriber giving. 6. Develop communication programs using new marketing materials, and more regular and personal contact using the new Development Calendar and Plan and donor management software. <p>CONTINUED...</p> <p>Dancer Hannah Bontrager as Lydia Bennette in Ballet Fantastique’s <i>Pride & Prejudice: A Parisian Jazz Ballet</i> premiere (2013) with a young audience member. Photo: Marc Allen Mintz</p> 

<p>Contributed Income</p>	<p>...CONTINUED</p>	<ul style="list-style-type: none"> • Corporate sponsorships: Gain a solid reputation among corporate donors and become regularly funded by numerous corporations. <ol style="list-style-type: none"> 1. Create formal list of leads and prospects (Board and/or Development Committee, Executive Director). 2. Recruit local corporate leaders (Board and/or Development Committee). 3. Meet with area corporations/build relationships (Executive Director/Development Director and Board members). 4. Invite corporate leaders to participate in relevant BFan events. 5. Develop a system for keeping corporate donors regularly informed of organization programs and progress (Executive Director and Development Director with Board Development Committee). 6. Create coordinated marketing and development activities to achieve greater donor retention and loyalty, and to develop deep and lasting relationships with our corporate stakeholders. • Grants: Gain a solid reputation among funders and become regularly funded by numerous foundations. <ol style="list-style-type: none"> 7. Meet with area foundations (Executive Director and Board members). 8. Invite program officers to appropriate BFan events. 9. Invest in grant-writing training for current staff. 10. Work with volunteer grant writers and cultivate grant-writing skills among current staff; give volunteers clear instructions for writing simple proposals. • Endowment/Planned Giving: Provide long-term support for operating, capital, and scholarship funding. <ol style="list-style-type: none"> 1. Evaluate the need for and scope of capital and/or endowment campaigns. 2. Establish a planned giving program. 3. Launch an endowment campaign for need- and merit-based scholarships. • Fundraising Events: Plan seasonal fundraising events that promote Ballet Fantastique productions and raise money for international touring and other targeted programs. <ol style="list-style-type: none"> 1. Set specific fundraising goals for each existing annual event. 2. For each annual event, document expectations and regular timeline for; Event Chair, Director of Development & Marketing, Development & Communications Associate, and Volunteer Coordinator. Each should have clearly-defined roles in supporting each event chair and ensuring event success. 3. Assign event chairs well in advance of each event. 4. Consider adding events to the season: (e.g., on-stage black tie gala celebration? In-studio holiday performance series with reception?). 5. Continue to engage in post-event debriefing and evaluation to ensure that events consistently improve.
<p>Earned Income</p>	<p>OBJECTIVE: Increase earned income—especially from the academy, touring, and ticket sales.</p> <p>NEED: To become more independent, self-sufficient, and diversified, we need to increase our earned income.</p>	<ul style="list-style-type: none"> • Increase earned income—see “Audience Building,” Section 3.6; “Expanded Touring Profile,” Section 3.7; and “Leading Training in the Northwest,” Section 3.8.



Ballet Fantastique dancer Caitlin Christopher in “Seller of Dreams” with Troupe Carnivale at a community event in downtown Eugene (2012). Choreography: Donna Marisa & Hannah Bontrager. Photo: Harvest Moon Photography

In 2000, Donna Marisa and Hannah Bontrager founded Ballet Fantastique. What started as a small endeavor in downtown Eugene is fast-becoming an organization recognized throughout the region as a leader in re-imagining the future of dance.

As it embarks on Hult Center Resident Company status and begins to tour internationally, Ballet Fantastique is at an important and pivotal moment of potential growth. The challenges, the demands, the risks and the opportunities presented by this moment form the background against which this Strategic Plan has been created.

With our core vision and key objectives firmly in mind, but understanding that events, planned and unplanned, will challenge many of our assumptions, we present this plan as a blueprint for the development of BFan over the next three years.

We remain determined to deliver a financially secure organization, answering to the needs and demands of the myriad artists and audiences it serves.

We believe that this Strategic Plan will support our endeavor.



Dancers of Ballet Fantastique at a youth outreach event in downtown Eugene (2010). Photo: Jared Mills



Dancers of Ballet Fantastique with guest artist Elijah Labay (Northwest Dance Project) in *The Misadventures of Casanova* (2013) at the Hult Center. Choreography: Donna Marisa & Hannah Bontrager. Photo: J. Robert Williams

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Errors and omissions excepted | correct at time of publication

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