

VANGUARD THEATER

STRATEGIC PLAN
2023 - 2028

MISSION

Changing social and cultural narratives
through theater dedicated to **DREAM:**
Diversity, Reciprocity, Education,
Activism & Mentorship



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2023-2028 Strategic Plan

INTRODUCTION

Dear Friends,

We are happy to share Vanguard Theater's first **Strategic Plan** with you. We hope that you will join us in realizing the aims and goals embedded here. For information on our background and history please refer to Appendix A.

This is an important moment in our world and at **Vanguard**. We envision an organization, industry, and community where we work together toward social justice. The cumulative impact of a global pandemic, high levels of inflation and economic stress for many, polarized politics, and reckoning with the frequency of violence and injustice in our communities, make theater a much-needed place of respite and a critical platform for sharing new stories and helping to shift thinking and beliefs.

Our newly stated mission, "Vanguard challenges conventional social and cultural narratives through theater dedicated to DREAM: Diversity, Reciprocity, Education, Activism and Mentorship," will guide us as we build practices and programs to tell diverse stories, propel community conversations through partnerships, and ensure that differences are reflected on and off stage.

Our planning process focused intentionally on how to sustain Vanguard now, and ensure that it is resilient and prepared to thrive in the future. Over the next five years we will pursue the following strategic directions toward sustainability.

Strategic Direction 1: Build strong systems and internal structure;

Strategic Direction 2: Achieve and sustain the resources necessary to thrive.

Strategic Direction 3: Increase Vanguard's value, visibility, and presence in Montclair and the region.

We are invigorated from the planning process and sincerely thank everyone who has participated, especially the Strategic Planning Committee, Board, Staff, and individual stakeholders who provided valuable input through interviews.

We welcome your feedback on this plan and hope we will see you soon at Vanguard.



Janeece Freeman Clark
Founding Artistic Director



Jessica Sporn
Managing Director



Maureen Ludwig



Jennene Tierney
Co-Chairs, Planning Committee

PLANNING PROCESS

As we looked to the next five years, several factors compelled us to answer questions about sustainability and build the foundation for Vanguard's future:

- The fast growth in Vanguard's first seven years and the need for staff capacity to sustain current levels of programming and operations;
- Our desire to serve the Montclair community and region more deeply;
- A need for clear financial and staffing models;
- A need for updated and clear Board policies and procedures;
- The experience of operating through the pandemic and Black Lives Matter;
- Conversations within the theater industry regionally and nationally, regarding equity and the workplace.

We took the following steps in our planning process:

- We retained a unique team of three consultants with expertise in Community and Cultural Development, Organizational Development, and Financial Planning, to support us in this important work;
- A Strategic Planning Committee composed of Board members and critical friends met monthly from February to August of 2022;

Our work was informed by:

- Analysis of Vanguard's operating practices, programs, and financial history;
- Staffing and operating models from 12 comparable theater companies in the U.S.;
- Comparable organizations' strategic plans;
- Key demographics of Montclair and the region;
- Interviews with 28 stakeholders (see Appendix B);
- An internal and external organizational assessment (see Appendix C);
- Monthly Planning Committee work sessions and multiple small-group writing sessions.

The results of our work include:

- Carefully crafted mission and vision statements that define our purpose and our aspirations for the future;
- A statement of our values that will guide actions and programs;
- A Theory of Change that describes Vanguard's approach and impacts;
- Three overarching strategic directions, measurable outcomes, and indicators of success to guide our work over the next five years;
- An informed Planning Committee that has been immersed for seven months in research and conversations about all aspects of Vanguard Theater and how best to meet its mission and vision.

WHAT WE LEARNED



Janeece Freeman Clark
Founding Artistic Director

Vanguard achieved several key milestones in its first five years, including a budget of \$500,000 and a space of its own. Vanguard shifted from mainstage to primarily education programs in its third year due to practical and revenue concerns. The company has gained the majority of its reputation and grant funding for that work, becoming known as a theater education entity. Now, Vanguard seeks to re-establish its core interest in, and capability for, producing high level mainstage productions, while maintaining its reputation as a provider of rigorous and meaningful education in and through theater.

In order to meet the needs of its expanded programming and operations, and to be true to its values, the organization now requires the structure, systems, governance, staff, and consistent revenue sources to sustain operations. The Strategic Planning Committee spent quite a bit of energy considering a new “people plan” (Appendix D). Staff, many of whom fill multiple roles, are compensated at rates far below industry standards, and volunteer significant time, are committed but exhausted. The Board, which is transitioning from a working group that has fulfilled staff roles to a governing entity, needs clear responsibilities, procedures and policies. Identifying general operating support is key.

Montclair, Vanguard’s home, has historically identified itself as a progressive community and a creative hub. With that comes both opportunity and competition for participants and funding. Vanguard has laid the groundwork necessary to garner needed resources, including a strong reputation with programming partners, audiences, and the youth and families it serves. As the economic divide in Montclair potentially widens, Vanguard has clearly decided to maintain its strong and unique reputation as a theater dedicated first and foremost to historically under-served people of all kinds.

MISSION

To challenge social and cultural narratives through theater dedicated to DREAM: Diversity, Reciprocity, Education, Activism and Mentorship.



VISION

To be recognized as a model in the theater community for:

- Purposeful inclusion of diverse voices and stories;
- Partnerships that propel cross community conversations;
- Casting and leadership that reflects our communities.



VALUES

Artistry: The highest standards for performance and production;

Challenging Conventional Social and Cultural Narratives: Critical thinking about long held assumptions;

Diversity: Honoring and including the richness of all histories and lived experiences on and off stage;

Reciprocity: The power of cross-sector partnerships;

Education: Skill building that nurtures creativity, promotes rigor, and encourages risk-taking and supportive collaboration;

Activism: Art and artists as catalysts for personal, social, and systemic change;

Mentorship: Influential relationships between diverse industry professionals and young artists.

THEORY OF CHANGE

THE PROBLEM

Our society does not value all people's narratives equally;

The theater industry perpetuates inequality through the stories it tells, its casting choices, and its leadership;

Underrepresented communities still struggle for equal voice and access.

OUR SOLUTION

Providing programs and performances that educate, entertain, and empower;

Encouraging artists to be catalysts for changing conventional narratives in the theater industry and our communities;

Creating cross sector partnerships that amplify each other's work, voices, and effect.

OUR IMPACT

Audiences and participants are informed and inspired to think critically about their assumptions;

Highly successful community-based partnerships increase attention to critical social issues;

Programs provide young people with the experience, skills, and connections to succeed, thrive, and create change in the theater industry and their communities.

STRATEGIC DIRECTIONS, OUTCOMES, AND INDICATORS OF SUCCESS



Increase Vanguard's value, visibility, and presence in Montclair and the region.



Build strong systems, internal structure, and culture.



Achieve and sustain the resources necessary to thrive.

These strategic directions are grounded in sustaining Vanguard, ensuring its resilience, and steering it toward a future in which it will thrive. We know that sustainability encompasses people, resources, and practices. For us, it will come from being mindful and continuing to honor instinct, opportunity, and risk-taking, filtered through an informed strategic approach. Therefore, our approach must include:

Consistently aligning our work with our mission and vision, and living our values;

Working smarter not harder;

Being continually aware of our operating environment and remaining relevant to those with whom we engage;

Strategically building on prior investments and achievements;

Employing and deploying our assets to best effect;

Finding solutions to limitations;

Reflecting on all aspects of our work in a deliberate way.

STRATEGIC DIRECTION 1: INCREASE VANGUARD'S VALUE, VISIBILITY, AND PRESENCE IN MONTCLAIR AND THE REGION.

<p>Outcome 1.1: Programming choices relate to issues in Montclair and the region.</p>	<p>Outcome 1.2: Partnerships raise Vanguard's profile in Montclair and the region.</p>	<p>Outcome 1.3: Vanguard is recognized as an essential element of the creative community of Montclair and surrounding communities.</p>	<p>Outcome 1.4: Vanguard is recognized as a unique creative hub and destination.</p>
<p>Indicators of Success:</p> <ul style="list-style-type: none"> • Audiences are actively engaged through talk-backs and programs with our partners. • Artists from various professional, geographic, and other communities are seeking opportunities to work with us. • We have widened our network of creators and performers. • We regularly present works by creators with historically marginalized voices. • Our programs give artists and participants opportunities to engage in activism. • We build on our assets and investments. 	<p>Indicators of Success:</p> <ul style="list-style-type: none"> • Partnerships are developed to address our limitations and expand our knowledge and understanding of diversity, including physical disabilities. • We develop and use a rubric to select partners based on our goals. • We use qualitative and quantitative techniques to assess outcomes. • We have developed statewide, regional, and corporate partnerships. 	<p>Indicators of Success:</p> <ul style="list-style-type: none"> • We are guided by audience development, communications, and social media plans for the organization and its programs. • We apply qualitative and quantitative data to audience development activities, and to telling our story. • We have an increased presence in community affairs and processes. • We attract audiences that reflect the demographics of our region. 	<p>Indicators of Success:</p> <ul style="list-style-type: none"> • Financial and in-kind support has increased to a level proportionate with more established cultural institutions in Montclair and Essex County. • Vanguard is increasingly featured in local and regional media and social media outlets. • Our audiences and participants represent a larger geographic reach. • We are developing plans for a fully accessible theater for professional productions, while using off-site facilities for rehearsing and teaching.

STRATEGIC DIRECTION 2: BUILD STRONG SYSTEMS, INTERNAL STRUCTURE, AND CULTURE.

<p>Outcome 2.1 (Systems) Information is shared mindfully and strategically across the organization.</p>	<p>Outcome 2.2 (Structure): The Board is structured, prepared, and actively engaged in governance.</p>	<p>Outcome 2.3 (Structure): Vanguard is appropriately staffed.</p>	<p>Outcome 2.4 (Culture): Organizational culture and values are intentionally reinforced.</p>
<p>Indicators of Success:</p> <ul style="list-style-type: none"> • Communications policies and practices foster the sharing of information across the organization. • The Customer Relationship Management system is well-utilized for planning and evaluation. • Qualitative and quantitative assessment techniques are applied in decision making for all areas of programming and operations. • Finances are managed utilizing Internal Controls that foster shared decision making practices. • There is a target for the reserve fund balance and a written policy for its use and replenishment. 	<p>Indicators of Success:</p> <ul style="list-style-type: none"> • Action and interaction are guided by revised bylaws. • Board members' energies are deployed according to an articulated structure. • A Board handbook describes roles and responsibilities, member cultivation priorities, and onboarding procedures. • Board is providing quarterly and annual budget oversight. • Progress implementing this strategic plan and its staffing model is being tracked quarterly. 	<p>Indicators of Success:</p> <ul style="list-style-type: none"> • Staff and salaries are expanding according to the model adopted with this plan. • Position descriptions have been written and are in use. • We have expanded the administrative team to include dedicated staff to manage Finance & Operations and Communications & Fundraising. • Consultants are supporting core functions during the growth phase. • Management regularly evaluates and provides staff with feedback. • The Board evaluates executive staff annually. 	<p>Indicators of Success:</p> <ul style="list-style-type: none"> • Our staff, Board, artists, audiences, and participants include people with diverse lived experiences. • Vanguard supports ongoing professional development for staff and Board. • Regular and structured reflection and assessment practices are embedded in operations and programming. • We engage differently abled artists and audiences in creative ways, recognizing that our building is not ADA accessible. • A Small Professional Theater contract with Actors Equity is in place.

STRATEGIC DIRECTION : ACHIEVE AND SUSTAIN THE RESOURCES NECESSARY TO THRIVE.

Outcome 3.1 Adequate resources are in place to ensure that Vanguard's operations and programming are sustainable.

- Annual goals for earned, contributed, and in-kind income are set and monitored.
- Expense budgets are monitored and adhered to.
- Corporate sponsorships support the mainstage season.
- In-kind resources for goods and facilities contribute to balanced budgets.

- Long term and annual fundraising plans have been written that include:
 - Individual appeals;
 - Major donors;
 - Institutions including foundations, corporations and government;
 - Corporate sponsorships;
 - Fundraising events.

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APPENDICES

APPENDIX A: VANGUARD THEATER BACKGROUND

Founded in 2015, Vanguard challenges conventional social and cultural narratives through theater dedicated to DREAM: Diversity, Reciprocity, Education, Activism, and Mentorship. We approach this mission through color and gender-conscious casting in our professional Mainstage productions, ongoing education and mentorship programs, and summer camps. Our professional production season is rounded out with cabarets featuring Broadway performers, an annual Drag Show, Juneteenth, and other special presentations. A hallmark of our practice is partnering with non-arts organizations, including public, private and higher education, government entities, advocacy groups, and those serving populations with specific needs. In our first seven years, we grew exponentially, acquiring and renovating a theater in the 4th Ward of Montclair in 2020.

A snapshot of our stakeholders helps to tell Vanguard's story: The Board is 55% BIPOC and 90% female; the staff is 60% BIPOC and 80% female; our creative team, production team, students and casts are 55% 52% 53% and 51% BIPOC respectively. Audiences and participants come from 10 of NJ's 21 counties. VTC is the only theater in the area devoted to social justice.

VTC's ongoing programming includes the production of musicals with professional, community and intergenerational casts; the Broadway Buddy Mentorship program that pairs 30 Broadway artists with 30 aspiring young adults ages 12-22, culminating in a cabaret at a professional venue; Summerstock VTC, an intensive two-week residential camp for ages 12-19; DREAM VTC, an education and performance program for ages 12-18 that tours to sites serving populations with specific needs; and VTC Kids, an education and performance program for ages 6-12.

Some recent and current partners and collaborations include:

- Annual Drag Show (since 2017) to benefit NJ Pride and in 2021 in partnership with Out Montclair;
- Sing For Our Lives, a concert to benefit Everytown for Gun Safety to shine a light on gun violence in inner cities and school shootings;
- A presentation of Everything's Fine Until It's Not, and panel discussion about the disparities in Autism resources and diagnoses in black and brown communities with Montclair Film;
- A benefit concert of the musical Runaways to benefit Covenant House NJ, followed by a sleep out by the cast on the front lawn of a neighboring church to raise awareness of teen homelessness in Essex County;
- Sensory friendly performances by DREAM VTC casts for Nassan's Place, which provides Autism resources and support for inner city students and their families;
- A book club and discussion group with students from Link Charter School followed by a performance from DREAM VTC's production of A Little Princess;
- Moderating a discussion with Jeremy Harris, author of Slave Play for Level Forward;
- Presenting Broadway Buddy on Broadway HD as a benefit for The Actors Fund during COVID;
- Talk-backs with Darkness Rising and Integrated Care Concepts about mental health in communities of color during performances of Next to Normal;
- Dedication performances and talk-backs with Montclair History Center, Hyacinth Foundation and Broadway House for Aids Continuing Care following performances of Rent;
- Benefit performances of A Portrait of Ray for Toni's Kitchen and Covenant House NJ;
- Hosting the first post-Covid Meet and Greet for the Montclair Business Improvement District.

APPENDIX B: ACKNOWLEDGEMENTS

STRATEGIC PLANNING COMMITTEE

Co-Chair: Maureen Ludwig*, *Community Advocate*

Co-Chair: Jennene Tierney, *Vice-President of People, Culture, and Equity, Geraldine R. Dodge Foundation*

MaryBeth Boger, *Vice-President for Student Affairs and Dean of Students, New Jersey Institute of Technology*

Meryl Budnick*, *Cultural Arts Director, Rosen Performing Arts Center*

Dwayne Clark, *Broadway Performer*

Janeece Freeman Clark, *Co-founder and Artistic Director*

Terri Gorgone*, *Instructor, Cicely L. Tyson Performing Arts*

Stacy Kilkenny*, *Women's Health Account Manager, Myovant Sciences*

Kate Larsen*, *Chief Counsel, Reuters News*

Melissa McHugh, *Education Director, Vanguard Theater*

Lindsay Roberts Greene*, *Director of Programs, Arts Ignite, Actress: Phantom of the Opera/Broadway*

Aran Roche, *Arts and Culture Fundraising Consultant*

Ilena Silverman*, *Deputy Editor, Features, New York Times Magazine*

Jessica Sporn, Esq., *Managing Director, Vanguard Theater*

Melani Wilson Smith*, *Chief Procurement Officer, PepsiCo*

Consulting Team

C. Lorenzo Evans III, *MBA, CLE Business Services Consultant*

Bill Flood, *Cultural Planning and Community Development Consultant*

Beth A. Vogel, *Project Manager; Planning & Development Consultant*

INDIVIDUAL STAKEHOLDERS

This plan is grounded in the valuable perspectives of the Strategic Planning Committee, Board, as well as the following interviewees:

Luz Miranda Crespo, *CFO MirRam Group; Miranda Family Foundation*

Erica Dorfler, *Broadway Actress*

Veronica Gonmiah, *Vanguard Theater Teaching Artist and Co-Founder, Aurway Repertory Theatre*

Hillary Hoover*, *co-founder of The Williams Hoover Team at Berkshire Hathaway HomeServices, NJ Properties.*

Luis Miranda, *Founding Partner MirRam Group and The Hispanic Foundation*

David Placek, *Managing Partner, BDP Holdings*

Deonté Griffin Quick, *Director of Programs and Services, New Jersey Theatre Alliance*

Veena Raj*, *Executive Vice President, Consumer Media Relations, Weber Shandwick*

Alex Ratner, *New York-based musical theater writer, music director and arranger, longtime Music Director and Arranger for Vanguard Theater*

Katie Schults, *Marketing Consultant, Vanguard Theater*

Sean M. Spiller, *Mayor, Montclair Township*

Ginger Steuart, *former Bookkeeper, Vanguard Theater; Montclair Foundation Board*

Kathy Walsh, *Major Gifts Officer, Covenant House*

Andrew Weker, *Montclair Arts Advisory Committee; Director, Montclair Orchestra*

Nadine Wright-Arbubakkr, *President and Founder Nassan's Place*

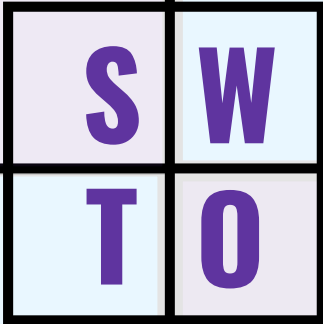
Peter Yacobellis, *Councilor at Large, Montclair Township, and Founder of Out Montclair*

- Member, Vanguard Theater Board of Directors

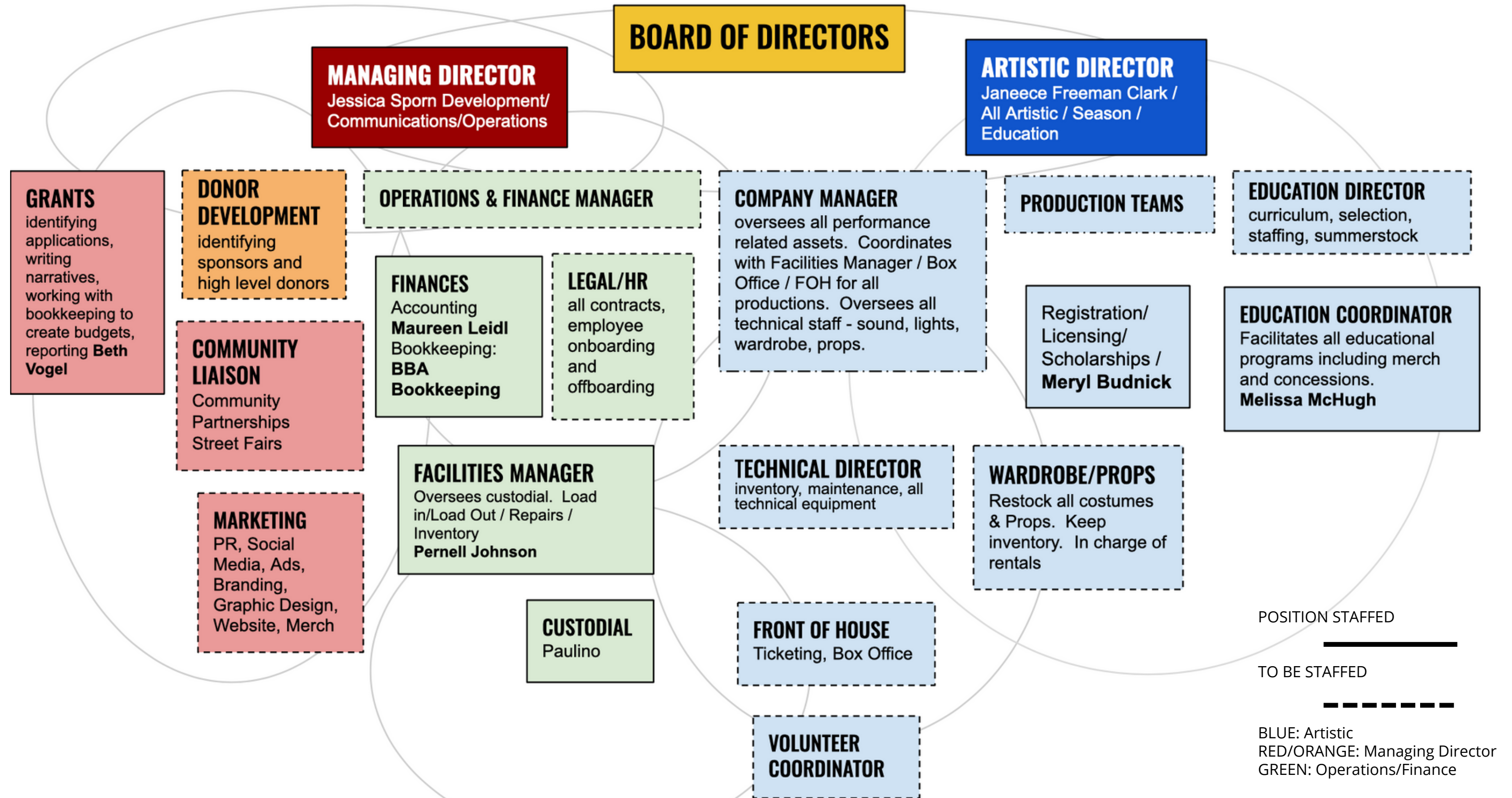
APPENDIX C: ANALYSIS OF VANGUARD’S STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS (SWOT ANALYSIS)

Following is an assessment of Vanguard Theater Company’s strengths, weaknesses, opportunities and threats, completed in 2022 through this strategic planning process. Strengths and weaknesses refer to Vanguard’s internal environment; threats and opportunities to Vanguard’s external environment. Data for this analysis came from 28 stakeholder interviews, research into 12 comparable theater companies, and the experience and insights of an incredible Strategic Planning Committee.

<p>STRENGTHS</p> <ul style="list-style-type: none"> • Commitment to organizational culture and founding principles; • Willingness to learn and be flexible; • Community support for mission; • Collaborative practices, partnerships; • Quality programs & performances that are well received by the community; • Talent and connection to talent; • Strong financial performance to date (earned & contributed revenue and timely financial filings); • Having our own space; • Dedicated staff and Board of Directors. 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> • Mission unclear to some (reciprocity, the narrative) • Confusion about whether VTC is an educational org., professional or community theater; • Rapid growth - can we sustain? • Small funding base; • Inconsistent data collection for audiences and donors; • Inconsistent constituent engagement; • Need better internal controls; • Space accessibility and length of lease; • Board of Directors roles and responsibilities need definition; • Internal communications are not always documented
<p>THREATS</p> <ul style="list-style-type: none"> • Diminished interest once established, no longer "new kid in town;" • Market conditions (inflation, market volatility, etc.) • Competitive fundraising environment; • Competitive environment for youth programming; • Lack of succession plan for Artistic and Managing Directors; • Location on Bloomfield Avenue / no parking; • Space is on second floor and there is no elevator. 	<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • Become a model for creative process (JFC's approach); • Strong and innovative community partnerships; • Connections with professional talent; • Build artistic& educational programming to expand budget/funding opportunities; • Benchmarking financial performance against competitive environment; • Equitable pay for all staff; • Long-term corporate sponsorships and foundation support; • Creation of organizational structure that supports mission and values; • Develop governance practices and Board; • Create system for audience and donor data management; • Leverage space for unrestricted revenue.



APPENDIX D: PROPOSED ORGANIZATIONAL STRUCTURE



APPENDIX E: PLAN SUMMARY

MISSION

Vanguard challenges social and cultural narratives through theater dedicated to DREAM: Diversity, Reciprocity, Education, Activism and Mentorship.

VISION

Vanguard is recognized as a model for:

- Purposeful inclusion of diverse voices and stories;
- Partnerships that propel cross community conversations;
- Casting and leadership that reflects our communities.

VALUES

- **Artistry:** The highest standards for performance and production.
- **Challenging Conventional Social and Cultural Narratives:** Critical thinking about long held assumptions.
- **Diversity:** Honoring and including the richness of all histories and lived experiences on and off stage.
- **Reciprocity:** The power of cross-sector partnerships.
- **Education:** Skill building that nurtures creativity, promotes rigor, and encourages risk-taking and supportive collaboration.
- **Activism:** Art and artists as catalysts for personal, social, and systemic change.
- **Mentorship:** Influential relationships between diverse industry professionals and young artists.

THEORY OF CHANGE

The Problem:

- Our society does not value all people's narratives equally;
- The theater industry perpetuates inequality through the stories it tells, its casting choices, and its leadership;
- Underrepresented communities continue to struggle for equal voice and access.

Our Solution:

- Providing programs and performances that educate, entertain, and empower;
- Supporting artists as catalysts for change in the theater industry and the community;
- Creating cross sector partnerships that amplify each other's work, voices, and effect.

Our Impact:

- Audiences and participants are informed and inspired to think critically about their assumptions;
- Highly successful community-based partnerships increase attention to critical social issues;
- Programs provide young people with the experience, skills, and connections to succeed, thrive, and create change in the theater industry and their communities.

STRATEGIC DIRECTIONS

- Increase Vanguard's value, visibility, and presence in Montclair and the region.
- Build strong systems, internal structure, and culture.
- Achieve and sustain the resources necessary to thrive.