



**Optimist Theatre  
2019 Annual Report**

**A celebration of our milestone  
10<sup>th</sup> season of Free Shakespeare in the Park**



A hale and hearty thank-you from the cast of *The Comedy of Errors*

# Mission

We believe that the theatrical arts broaden and enrich those parts of our minds and spirits that are most essentially human. Optimist Theatre is driven to reach artists and audiences across the economic, ethnic, and experiential landscape. We educate, entertain, and inspire through creative works of artistic integrity.

# Who?

Optimist Theatre presents free Shakespeare in the Park each summer to the people of Greater Milwaukee and beyond.

***2019 marked our milestone 10<sup>th</sup> season, 4<sup>th</sup> at the beautiful Peck Pavilion along the downtown Milwaukee Riverwalk and 2<sup>nd</sup> as a Resident Partner with the Marcus Performing Arts Center.***

# Why?

Shakespeare speaks to the very human parts of all of us. Yale Critic Harold Bloom even credits Shakespeare with inventing humanity as we understand it.

Shakespeare in the Park strives to bring people from all parts of Milwaukee together for a shared experience, using great, relatable, classical theatre to connect people in a city that struggles with racial, economic, and geographic divisions. We serve this need by providing financial, physical, and cultural accessibility.



- **Shakespeare in the Park is financially accessible.** Milwaukee has a thriving arts scene, but the cost of attending a professional show is prohibitive to many residents. Our performances are free to the audience. No reservations or dressy clothes are needed: People who are curious about live Shakespeare can walk in off the street in T-shirts and shorts.

***Between 40% and 60% of each audience hail from ZIP codes that represent folks living at less than 200% of the federal poverty level.***

- **Shakespeare in the Park is physically accessible.** The Peck Pavilion is centrally located, in an area where people from all parts of the city can feel safe walking or parking at night. It is reachable by numerous bus lines and the new Hop streetcar, and the Marcus Center can provide transportation for groups. The Peck Pavilion is also handicapped accessible.



• **Shakespeare in the Park is culturally accessible.** We actively seek to put together a local cast and crew that represents the city’s diverse demographics so people in the audience can see themselves represented onstage. We collaborate with a variety of individuals and organizations to recruit artists of color. We focus on making Shakespeare’s language understandable and his work meaningful for all audiences, from Shakespeare newcomers to longtime fans.

## 2019 Goals and Results

Every year, Optimist Theatre sets immediate goals for the season. The results are used to evolve the organization with a running **5-year plan**. The following items detail those Goals, Results, Unexpected Benefits, and Lessons Learned.

### GOAL

Produce Shakespeare’s brilliantly funny *The Comedy of Errors* in summer 2019, offering 12 to 13 free performances at the Peck Pavilion in downtown Milwaukee. At least one performance will be a weekday matinee, targeted to groups working with underserved youth as well as veterans and senior citizens.



### RESULTS

**Exceeded Expectations.** Optimist Theatre successfully produced 13 well-received performances of *The Comedy of Errors*. These performances included 2 weekday matinees (1 more than projected). Matinees were attended by groups including ACAP, Chai Point, Goodwill Center for Training, Goodwill Day Services, Milwaukee LGBT Youth Group and the LGBT Center Adult program, Neighborhood House, PEARLS for Teen Girls, TRUE Skool, and Urban Underground ,among others.

### UNEXPECTED BENEFITS AND ISSUES

Problems encountered involved a lack of physical space for holding rehearsals, building the set, and gathering for office work and meetings. Shakespeare in the Park is outgrowing the spaces that have been used for many seasons for these purposes. Spaces more conducive to the work at hand are available but represent a much greater budget allocation.

The Marcus Performing Arts Center lent a huge hand in providing a an ideal rehearsal hall. This is a space usually used by the touring Broadway shows that play at the Marcus.

## GOAL

We will hire a minimum of six members of Actors' Equity Association (AEA) union, including the stage manager, and three IATSE union members. We expect the vast majority of the cast and production personnel, totaling near 30, to be from Milwaukee County.

## RESULTS

Unexpected production and artistic opportunities altered the initial goal of hiring a minimum of 6 AEA members – we hired 4 instead – and 3 IATSE members – we hired 5 instead and added valuable rehearsal time. Traditional theatre casting typically awards the most experienced, professional actors with the starring roles. For the youth-oriented *The Comedy of Errors*, we flip-flopped to feature younger, more relatively unknown actors in those roles and the professionals played multiple supporting characters and appeared in many more scenes. Having those professionals working in more frequent and varied character situations helped “drive” the scenes and provided an invaluable constant example of the work ethic that will help young actors in their careers. It was a fantastic experience.



Less-seasoned actors require more one-on-one coaching, and we had the opportunity to contract a dedicated vocal and text coach who was available for almost all rehearsals. Featuring these younger faces helped our younger audience more easily connect with the action as well.

The production opportunity focused on 2 areas – the ability to access the actual performance space earlier than usual and access to additional IATSE members. Production value is directly connected to these factors, so we made the strategic decision to take advantage of them.

All cast and crew were from the Greater Milwaukee area, with the exception of 2 actors from Madison, thus both financially supporting and enhancing the skills of our local creative economy.

Optimist Theatre was able to hold 6 weeks of rehearsal vs the typical 5.

## GOAL

We will continue to work on building long-term relationships with community groups. Our goal is for 16 groups to attend a performance, a 33% increase over 2018.

## RESULTS

**Our goal of securing 16 community groups to attend was exceeded. A total of 22 attended.** Adding our immediately popular “Talk Forwards” (vs the traditional post-performance talk-back) was instrumental in helping our audience and in particular our youth groups to connect with the experience they were about to have and to the rest of the audience.

Bridgid from PEARLS for Teen Girls shared this...

“**What a wonderful show!!** I just want to sincerely thank you for inviting our group to come see it. The girls really enjoyed watching the play, and I know it certainly exceeded their expectations. The cast was so talented and funny; they managed to convey the meaning and humor of the story in a way that made it really accessible to the audience. The setting and costumes were beautiful, creative, and provided a fun twist on a classic story. And the choreography of the staging was a delight to watch; I can only imagine how much hard work and attention to detail went into this performance, and I’m so glad our girls were able to be there to see it. Thank you again for providing us with the opportunity to come to the show! We had a great time.”



A new level of connection was also made by more prominent interactions with the 4 young men who were our **MPS interns** this summer. They circulated more with surveys, worked the merchandise and information booths, sat through the plays several times each (3 of whom had never seen Shakespeare before) and chatted with audience members about their experiences. They also helped design the lovely 10<sup>th</sup> season retrospective displays enjoyed by the audience before each show.

**UNEXPECTED BENEFITS AND ISSUES** Unexpected benefits occurred in the area of community outreach in terms of reaching population segments where we’d not yet made significant inroads. Thanks to connections with Optimist Theatre staff, community outreach included a significant presence from the **LGBTQ** center with 2 group outings. Familiarity helps grow a comfort level and a greater sense of “welcome,” so a direct benefit of being at the Peck Pavilion for the 3rd year was an increase in attendance by members of the downtown Milwaukee homeless population.

Direct invitations to homes in inner-city neighborhoods took a new step forward. We hired an experienced community organizer and our door-to-door neighborhood distribution program included neighborhood businesses for the first time, including a grocery store in Harambee that inserted **flyers in their grocery bags**.

An unexpected issue (mixed blessing?) occurred as a result of a very successful outreach to senior groups. The Peck Pavilion is **ADA accessible**; however, the demand for seating for people with mobility issues was greater than availability at times. Ultimately, with some creative reservations, we were able to accommodate all requests for those in wheelchairs or with other mobility issues.

### GOAL

Optimist Theatre's well-established educational and engagement outreach program "To Be! Shakespeare Here and Now" continues to reach youth and community members in Milwaukee and throughout Wisconsin.

In addition to our existing program, we will offer "**Shakespeare Inspires: Stories from the City**" to Urban Underground and Lincoln Center of the Arts (MPS), free of charge to those institutions, during the 2018/2019 school year and develop additional partnerships for 2019/2020.

### RESULTS

"Shakespeare Inspires: Stories from the City" — Optimist Theatre partnered with community groups where they acted as mentors in development of our new educational outreach program. They included MPS, Urban Underground, Running Rebels and Sojourner Family Peace Center. A total of 8 workshops were held at the MPS Lincoln Center of the Arts and at Story School for Neighborhood House – Urban Underground's schedule of availability changed. The experience for the youth who participated was quite positive and we learned a great deal by putting the program into action.



We are outlining some more direct connections between Shakespeare's themes and language with the issues encountered by youth and plan to continue to offer this evolved program.

This new program was made possible by grants from the Green Bay Packers Foundation and the Wisconsin Humanities Council.

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# FUTURE PLANS

At the conclusion of each season, the Executive Director helms a retreat to review all the feedback from surveys, post-mortem meetings, post-production audience and community group feedback, etc. Those experiences are used to identify the next year's immediate goals and to inform the evolution of Optimist Theatre's 5-Year Plan. That evolution helps identify big-picture goals as well as immediate goals for the coming season.

**2020** Optimist Theatre is eager to leap into our 2<sup>nd</sup> decade of producing free Shakespeare in the Park and plans for Shakespeare in the Park 2020 are well underway.

## Artistic

- Shakespeare's pivotal and iconic ***Romeo and Juliet*** has been selected and announced;
- Space and dates have been secured at the **Peck Pavilion**; and
- **Mr. David Cecsarini**, the Producing Artistic Director of Next Act Theatre, is on board to direct.

**Community outreach** is deepening. With the evolution of our educational outreach program, we are reaching out to more groups for off-season workshop sessions. Our immediate focus is on a large number of lesser-known organizations – those that aren't the recipients of as much as the bigger youth-serving organizations.

**Development** is evolving, thanks to new mentorship from Milwaukee-area philanthropists who offer specific advice and feedback from an external, learned perspective. Light is seen at the end of the tunnel on two new avenues of board development – both of which will also add more diversity to the team.

**Production support** is a distinct focus. A search for a physical space to build the sets is already underway. We're also seeking office workspace that can be used when the production team and MPS interns come together. Although the Fry home office is an effective and free space for year-round work toward our production and outreach goals, Optimist Theatre has outgrown the it for seasonal work.

# Beyond 2020

## Artistic

Optimist Theatre has taken a lead in creation and participation in the new theatre collective and collaborative organization The Milwaukee Theatre Alliance. The MTA is opening doors to designers and actors that had never been on the Shakespeare in the Park radar.

We will build on the association with well-regarded local theatre professionals such as our 2020 production director David Ceasarini to raise interest in working with Shakespeare in the Park.

## Development

Earned income. A champion within an influential organization is poised to clear the path and support re-instate an annual fundraising event. Optimist Theatre held events in the first 5 years of producing Shakespeare in the Park. The loss of an effective space and a move from Alverno College to a city park shifted the growth and attractiveness of our event from a steady increase to a dip that rendered it unworthy of effort.

## Outreach – Educational and Community

A new mentoring relationship with Bader Philanthropies holds great promise in crafting Optimist Theatre evolving focus and approach to connecting with Greater Milwaukee community members – in particular at-risk youth. Discussions on effective, long-term means for outreach and bringing people together via Optimist Theatre's Shakespeare niche are exciting and doable. Bader contacts are sharing real-life experiences from the folks on their team and from the effects of their location move to Harambee.

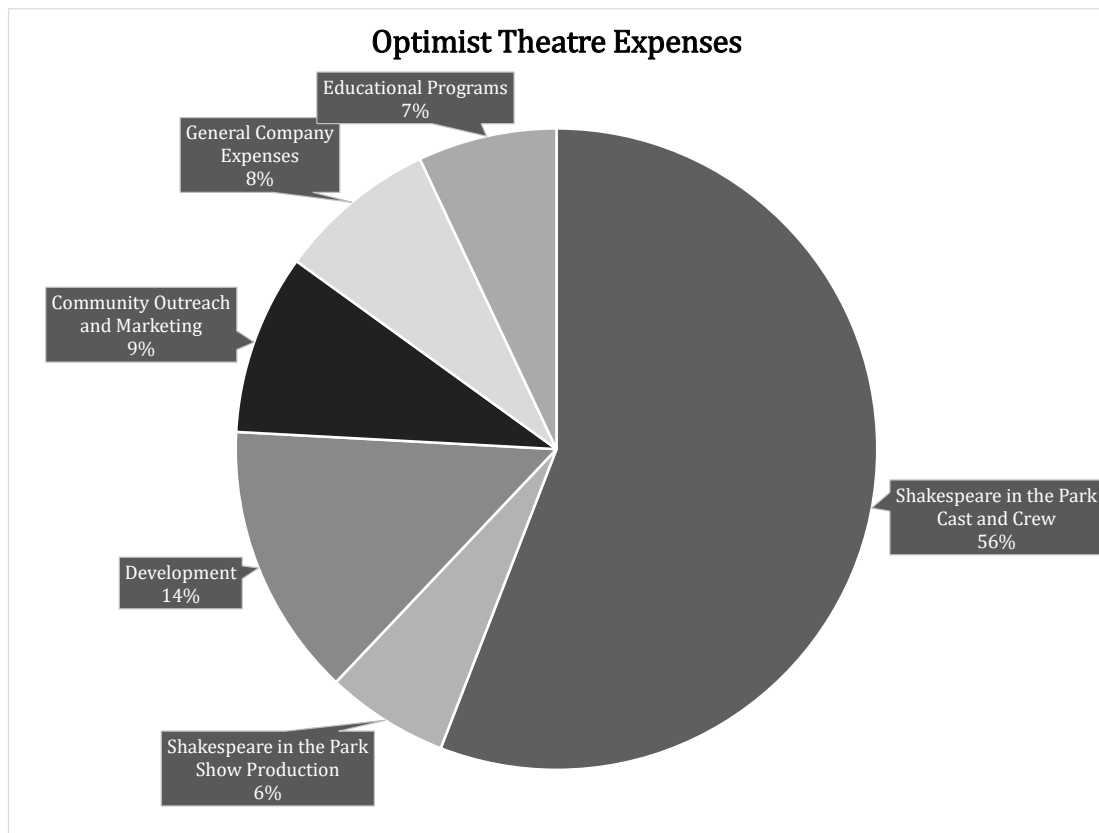
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# FINANCIALS

Optimist Theatre focuses our expenses on the production – in particular production personnel. The pie chart below and our annual Income and Expense statements illustrate this dedication.

The next largest expense is in development, which is natural for a large-scale production that is free to attend.



**Optimist Theatre Income and Expense Statement  
January 1 through December 31, 2019**

<b>Income</b>	<b>Amount</b>
Cash Carryover from 2018	\$40,769
Foundation Support (Isabel and Alfred Bader Fund, Greater Milwaukee Foundation, Herzfeld Foundation, Lynde & Harry Bradley Foundation, Etc.)	\$52,500
Grants (Wisconsin Arts Board, Milwaukee Arts Board, Milwaukee Public Schools)	\$20,705
Individual Giving (Personal Donations, Shakespeare in the Park Memberships)	\$32,499
Performance Fees (To Be! Shakespeare Here and Now)	\$5,034
Corporate and Business Sponsors (BMO Harris Bank, Paris Dentistry)	\$21,750
Cash subtotal	\$173,257
In-Kind Donations (Human Resources, Storage Space, Auditions, Rehearsals, Performances, Security, Community Outreach, Etc.)	\$84,850
<b>Total Income</b>	<b>\$258,107</b>
<b>Expenses</b>	
Shakespeare in the Park Cast and Crew (Artistic, Production, Executive, Communications, House)	\$54,076
Shakespeare in the Park Show Production (Sound, Lights, Costumes, Set)	\$19,922
Development (Human Resources, Database, Printing, Postage, Etc.)	\$30,239
Community Outreach and Marketing (Human Resources, Printing, Distribution, Etc.)	\$14,083
General Company Expenses (Management, Admin, Supplies)	\$12,042
Educational Programs (Workshop Facilitators, Administration, Etc.)	\$11,913
Cash subtotal	\$142,275
In-Kind Donations (Human Resources, Storage Space, Auditions, Rehearsals, Performances, Security, Community Outreach, Etc.)	\$84,850
<b>Total Expenses</b>	<b>\$227,125</b>
<b>End of Reporting Period Surplus</b>	<b>\$30,982</b>

**Financial Audit Note Regarding Optimist Theatre Income and Expense Statement:**

Wisconsin Statute § 202.12 (3). Subsection b requires organizations that receive in excess of \$400,000 in contributions per year to produce a GAAP audited financial statement bolstered by a CPA's opinion. Subsection bm requires organizations that receive between \$200,000 and \$400,000 per year to produce a GAAP financial statement that has been reviewed by a CPA.

As shown in our financial statements, after deducting in-kind donations and prior year cash carryover, Optimist Theatre receives less than this threshold in total cash income for each fiscal year. We therefore are not required by federal or state law to produce a formal financial statement endorsed by a certified public accountant.

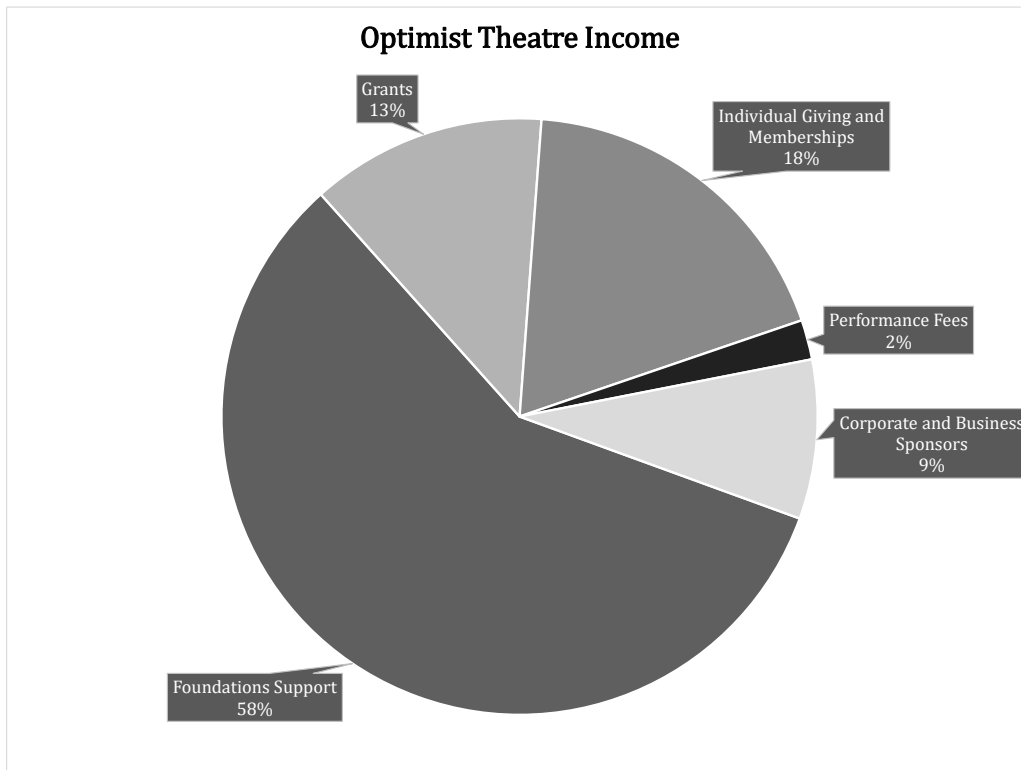
Because this is not a legal requirement, we have chosen to devote our limited resources to producing top-quality free Shakespeare performances for the city of Milwaukee, rather than for accounting fees that are not required.

We expect that in future years, we will rise above the \$200,000 cash requirement -- and we will then joyfully obtain a formal CPA-reviewed financial statement.

# Financial Stability

Every season, Optimist Theatre crafts goals that are specific to that particular production but also with an eye toward furthering the company's 5-Year Plan.

The Financial Support section of the plan focuses on five areas of growth with evolving immediate and long-term plans. Pursuing these areas will be key in sustaining Optimist Theatre's programming.



## Foundations and Grants

The cornerstone for Shakespeare in the Park funding is foundations such as the Greater Milwaukee Foundation, Herzfeld Foundation, Lynde and Harry Bradley Foundation, Bader Philanthropies, CAMPAC and the Milwaukee Arts Board. We have secured grants from family foundations such as Steigleder, Gardner, and Plunkett.

Optimist Theatre will continue to seek this vital funding. In the long term we are working toward meeting the requirements for grants from the National Endowment for the Arts: Shakespeare in American Communities, and Impact100.

## Individual Giving

Direct donations and Shakespeare in the Park memberships are growing. Memberships grew by 100% from 2016 to 2017 and 69% from 2017 to 2018 and are continuing that trend.

Currently more than 50% of our members are on yearly auto-renewal. It's a key source of funding, exceeding grants and business sponsorships.

## Board Development

Optimist Theatre has created mentorship relationships with a variety of knowledgeable and successful arts supporters, some with the possible goal of board membership and some with the possible guidance and introductions to potential new board members.

We have also connected with the Hispanic Professionals of Greater Milwaukee's Board Pipeline program and are pursuing those avenues of diversity and connections.

## Optimist Theatre 2019-2020 Board of Directors



**Michelle Owczarski**  
President, Board of Directors

Michelle graduated from Marquette University with a major in broadcast and electronic communications and is an active volunteer with St. Thomas Aquinas

Academy in Milwaukee. Michelle is on the staff with the UWM Panther Arena and owns a voice-over and video production company. [pixelsandtape@gmail.com](mailto:pixelsandtape@gmail.com)



**Michelle Young**  
Vice President, Board of Directors

Michelle is a human resources professional focused on program management and continuous improvement

at Rockwell Automation. She has a master's degree in human resources and industrial relations from the University of Minnesota and a BA in psychology from Hamline University. She is especially proud that Shakespeare in the Park makes theatre accessible to the entire community. [michellyoung@wi.rr.com](mailto:michellyoung@wi.rr.com)



**Tyler J. Hull**  
Board Member

TJ is an award-winning composer. He graduated from Ball State University and holds a graduate degree from Boston

University. He plays viola for the Fox Valley Symphony and is director of orchestras for Franklin Schools. [tjhull@gmail.com](mailto:tjhull@gmail.com)

**Laura Stone Barnard**



**Azeeza Islam**  
Board Member, Educational Outreach Advisor

Azeeza has been a teaching artist in the Milwaukee Public Schools for more than 40 years and an active advocate for all arts education. [azeezaislam@yahoo.com](mailto:azeezaislam@yahoo.com)



**Board Member, Development Advisor**

Laura is a retired communications and public relations professional who has directed communications at Wheaton Franciscan Healthcare and the Milwaukee Jewish Foundation. She has also served on the boards of a number of nonprofit organizations, including the Alzheimer’s Association and the Mitchell Park Domes. Laura is a lifelong fan of film and theatre. [laura.barnard@sbcglobal.net](mailto:laura.barnard@sbcglobal.net)

**Ron Scot Fry**



**Founding Artistic Director, Board Member**

Ron works as a teacher, designer, director, writer, and performer and has directed and designed numerous productions for Shakespeare in the Park. He was artistic director for Renaissance Entertainment for 19 years. Ron’s one-man show, “To Be! Shakespeare Here and Now,” has played throughout the United States and in Italy. [rsfry@optimisttheatre.org](mailto:rsfry@optimisttheatre.org)



**Susan Scot Fry  
Executive Director, Board Member**

Susan has more than 25 years of festival and special event producing experience, 30 years of outdoor theater experience, and is the owner of a niche tour company. Susan is devoted to the pursuit of freer Shakespeare in the Park for Greater Milwaukee. It’s her life’s work. [ssfry@optimisttheatre.org](mailto:ssfry@optimisttheatre.org)



**Emilio De Torre  
Board Member, Community Outreach Advisor**

Emilio De Torre is the award-winning director of youth and programs at the ACLU of Wisconsin and has worked there since 2006. He is the former director of education services at Madison Square Boys & Girls Clubs, where he supervised programs for 12,000 young people at eight Boys & Girls Clubs in Brooklyn, Bronx, Manhattan, and Queens. He has served on the boards of Milwaukee Public Theatre and TRUE Skool. [edetorre@aclu-wi.org](mailto:edetorre@aclu-wi.org)

## Business Sponsorships

The move to the Marcus Center provides higher visibility, potentially making Shakespeare in the Park more attractive to business supporters who are seeking a return in marketing value. Our relationship with current sponsor BMO Harris Bank is solid, and we are seeking to partner with our downtown neighborhood businesses.

## Earned Income

2019 marked a renewed focus on generating earned income. It was our first foray into selling merchandise at the annual event. T-shirts, seat cushions, and baseball hats sold particularly well.



Optimist Theatre is strongly considering re-implementing a ticketed fundraising event. Past experiences were positive and, with the expanded support services offered by Marcus Center Resident Partner status, it may be possible again.

# Thank you ...

... for this opportunity to share the 2019 season of Optimist Theatre and beyond.

Susan Fry  
Executive Director  
Optimist Theatre  
2010 N. 1<sup>st</sup> Street  
Milwaukee, WI 53212  
262-498-5777

[www.FreeShakespeareInThePark.org](http://www.FreeShakespeareInThePark.org)

For the latest news, follow us on our Facebook page at [www.facebook.com/ShaxParkMKE](http://www.facebook.com/ShaxParkMKE)

[SSFry@OptimistTheatre.org](mailto:SSFry@OptimistTheatre.org)



## Herzfeld Foundation

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