

## A. Organization & Contact Information

**Case Id:** 14435  
**Name:** Winston-Salem Theatre Alliance - 2022/23  
**Address:** \*No Address Assigned

Completed by sbr@wfu.edu on 11/18/2021 11:53 AM

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### A. Organization & Contact Information

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The Request for Proposals and additional materials to assist with completing the application can be found on the City's webpage for [Community Agencies](#)

#### A.1. Organization Name

Winston-Salem Theatre Alliance

#### A.2. Project/Program

Black Box Theatre

#### A.3. FY 2022-23 Funding Request Amount

\$100,000.00

#### A.4. Agency's Total Operating Budget

\$318,000.00

#### A.5. Mailing Address

650 W 6TH ST WINSTON SALEM, NC 27101

#### A.6. Project/Program Location Address

650 W. Sixth St. Winston-Salem, NC 27101

#### A.7. Organization Website

www.theatrealliance.ws

#### A.8. Year 501(c)(3) status obtained

1988

#### A.9. Organization Fiscal Year

07/1-6/30

#### A.10. Federal Tax ID Number

#### A.11. Federal DUNS Number

#### EXECUTIVE DIRECTOR/MANAGER

##### A.12. Name, Title

Jamie Lawson, Artistic Director

##### A.13. Email

jamie.lawson@replacements.com

##### A.14. Phone

(336) 508-1312

#### CONTACT

##### A.15. Name, Title

Jamie Lawson, Artistic Director

##### A.16. Email

jamie.lawson@replacements.com

##### A.17. Phone

(336) 508-1312

#### BOARD CHAIR

##### A.18. Name

Stephen Robinson

##### A.19. Term Expiration

06/30/2022

##### A.20. Email

sbr@wfu.edu

##### A.21. Phone

(336) 692-2649

## B. Project Overview

Completed by sbr@wfu.edu on 11/19/2021 2:13 PM

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## B. Project Overview

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Please provide the following information.

### APPROACH (7 POINTS)

#### **B.1. Provide a concise description of the proposed project/program, indicating specifically how City funds will be used. Briefly, what are the goals/objectives of the project/program?**

After years of planning, fundraising and construction, Winston-Salem Theatre Alliance (WSTA) this past September opened the doors and welcomed patrons to its beautiful new facility in downtown Winston-Salem. Phase 1 of the project, which involved refurbishing the old Blue Bird Cab Company, is now complete. Next up is Phase 2, which will include the construction of a Black Box Theatre (BBT) on the top floor, the installation of an elevator connecting the back top floor to the area downstairs, and the creation of a Tribute Garden which will be an outdoor art installation, a peaceful and contemplative space that will be an arts attraction downtown.

WSTA respectfully requests funding from the City for the Black Box Theatre portion of Phase 2 . The BBT will be a smaller, more flexible performance space that can be used in different ways to accommodate a wide variety of needs. While the specific architectural plans have yet to be drawn up, WSTA anticipates that the BBT will be roughly 60 feet by 20 feet, 1200 square feet, and will seat approximately 50 people.

The objectives for adding the BBT include providing a space for smaller venue shows, experimental theatre, open mic nights, movie nights, stand-up comedy and improv nights, drag nights, cabarets, dance classes, senior series, staged readings and concerts, summer camps, children’s productions, rehearsals, business meetings and more. The Black Box will allow WSTA to preserve its character and history by creating theatre that will be evocative of shows that, for many years, were staged in the tiny, funky, intimate space at its previous Northwest Blvd location– shows that that have the “feel” of WSTA’s traditional brand.

Financial goals include increased revenue from ticket sales, concessions, and also from rental fees. Opening up the Black Box for use by other arts organizations and groups in the community will not only increase WSTA’s revenue, but it will also provide a reasonably priced option for those groups seeking a small, intimate downtown performance venue. This will provide more equity in the downtown arts district and create more performance opportunities for a wider range of artists.

One WSTA goal is to donate use of the space for worthy causes. For example, in recent years, Industries for the Blind has used WSTA space for part of their SEE camp at no cost to the organization. The camp has had to work around whatever show was running at the time, including any sets that were on the stage. That service , which was provided for visually impaired children, has evolved into the formation of SHINE!, a summer theatre arts camp for special needs children and youth. The BBT will provide a safe convenient space for the SHINE! camp , separate from the main theatre space, at no charge. WSTA will also use the BBT for fundraisers to benefit other non-profits and charitable endeavors in the Winston-Salem community.

WSTA aspires to become both a cultural hub in the City of the Arts and a contributor to the economic vitality of

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downtown. In its new location, with its beautiful new facility, WSTA is poised to bring a growing number of patrons into the downtown area to spend money at local restaurants, bars, hotels and retail stores. The BBT will increase WSTA's reach and its ability to accomplish these goals, not only for itself, but for the community at large.

**B.2. How will a participant access the proposed project/program, use the services, and derive a beneficial outcome from participation?**

Once the BBT is up and running, patrons will be able to purchase tickets to attend a wider variety of small venue performance events than what has typically been offered in Winston-Salem. They will also enjoy more frequent offerings of such events. Other arts groups will be given the opportunity to rent the space for a reasonable fee, which will increase their ability to bring more programs and performances to the community. WSTA's Board of Directors will form a standing committee that will oversee the Black Box. Participants who wish to rent the facility will be referred to this oversight committee.

**B.3. Describe the unmet need that the proposed project/program seeks to address. Include data supporting the need.**

Accessible Black Box spaces are few and far between in Winston-Salem. The Black Box spaces that exist are located primarily in school and college settings and are not easily accessed for use by the public or community groups. ARTC Community Theatre in the Arts District rents out its charming small theatre space to groups, but with its permanent stationary seating and stage, it lacks the flexibility of a true Black Box. As far as WSTA knows, the only Black Box type theatre currently accessible to community groups is the Mountcastle Forum at the Milton Rhodes Center. Accordingly, Theatre Alliance's proposed Black Box will meet the community's need for an affordable additional small performance space that community groups can access for smaller venue programming and events.

The BBT also will meet the community need for cultural attractions that will bring patrons downtown to spend money in local businesses including restaurants, bars, hotels, and retail stores. The BBT will thereby enhance both the arts scene and the local economy in downtown Winston-Salem.

**COLLABORATION (6 POINTS)**

**B.4. Describe any specific collaborative relationships with other organizations (public or private) and how they will impact the project/program. How will collaboration contribute to the planning, implementation, operation, oversight, and performance measurement of the proposed project/program?**

WSTA volunteers regularly come together in support of other non-profit entities, working in partnership with organizations like Aids Care Service, Forsyth Educational Partnership, Make-A-Wish Foundation, Winston-Salem Rescue Mission, Stomp Out Bullying, American Red Cross, The Trevor Project, and more. The Theatre holds staged readings in its "Buy the Book" series, donating 100% of proceeds to various non-profit entities in the community as well as fundraising concerts to help others in need. With the additional space that the BBT will provide, WSTA will be positioned to host even more of these charitable events since they will no longer have to be scheduled around the availability of the main stage.

For the past couple of years, WSTA has focused primarily on surviving COVID, finishing construction, and moving into its new home. Now that the new facility is up and running, the Theatre is positioned to begin seeking out partnerships and collaborations with both the downtown business community and other arts organizations in the area. With retail, coffee houses, bars, restaurants and hotels nearby, WSTA is poised to provide an economic boost to local businesses, hopefully even forming partnerships with them. WSTA is already exploring opportunities for building community relationships, having met with Jason Thiel of the Downtown Winston-Salem Partnership. WSTA also envisions partnering with both The Black Theatre Festival and the River Run Film Festival to provide the BBT as an additional venue for both those important and impactful community arts events.



## C. Strategy and Performance

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Case Id: 14435

Name: Winston-Salem Theatre Alliance - 2022/23

Address: \*No Address Assigned

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### C. Strategy and Performance

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Please provide the following information.

#### STRATEGY (5 POINTS)

C.1. The City of Winston-Salem's strategic priorities, adopted most recently in the [2017-2021 Strategic Plan \(2019 Update\)](#) and under review for adoption by City Council for FY 2022 - FY 2025 Strategic Plan, are used as guiding principles to establish community priorities based on the vision, mission, and values set forward by the Mayor and City Council.

Indicate which of the City's strategic focus areas your program aligns with best (select one):

Economic Vitality and Diversity

C.2. Select the service area(s) that your project/program relates to:

- Housing/Homelessness
- Economic Development
- Construction Rehabilitation
- Poverty Reduction
- Arts and Culture
- Youth
- Public Safety
- Transportation
- Other

#### PERFORMANCE (15 POINTS)

C.3. Describe the system to be used to track participant and program data. List any key reports and their frequency that will be used to capture project/program performance.

Here is an outline of how WSTA plans to track the progress of the new Black Box Theatre through both the construction phase and the permanent use phase.

Data collected during phase 1: Design and building (BBBC=Black Box Building Committee, BBMC= Black Box Management Committee)

1. Track Milestones

- o Architect completes design by March 30, 2022 and reports to BBBC
- o Architect, Contractor, BBBC produce timeline and budget by June 30, 2022
- o Construction starts by September 30, 2022

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- o Open by June 2023
  - o BBBC will report verbally and in writing to monthly board meetings
2. Fundraising will be ongoing ongoing. The timeline above is intended to leave ample time to fundraise before building starts and finishes. Fundraising and payments will be tracked on a separate spreadsheet by treasurer.

Data collection during phase 2: Tracking the use of the BBT by BBMC

1. Annual number of events sponsored by WSTA
2. Annual number of events sponsored by guest organizations
3. For each event keep track of
  - o Volunteer list including directors, cast, crew,... For performances this might include a playbill for example.
  - o Audience numbers and demographics
  - o Description of guest organization
  - o Cost and income
4. All of the above can be organized in a simple spreadsheet

**C.4. Explain the steps that will be taken if the stated program goals provided in C.3. are not achieved.**

Review of WSTA's progress will be ongoing in both phases.

For the design and building phase there is a clear goal that we are working towards and that is to open the BBT for events. If fundraising takes longer than expected, for example, then we will simply continue to pursue all available avenues until the goal is achieved. Ten years ago we were complete novices in this area, but two successful campaigns, particularly our most recent campaign, have taught us a lot about persevering and succeeding in the realms of fundraising and construction. We still have much to learn, but we are working with consultants to develop a five year strategic plan, and we are seeking partners and new board members who can bring us further experience and enthusiasm

Regarding our goals in outreach and increased diversity we anticipate that we will never be "finished." We will continue to keep these as a central goals and will actively continue to learn about and develop new strategies. This is one major part in our current strategic planning process (mentioned above). In addition we recently sent a board member to a diversity workshop run by a local arts organization. That board member will be reporting at our December 2021 meeting with recommendations about new strategies. We are confident that the nature of our Black Box Theatre will be an extremely valuable resource for helping us to attract and build new relationships.

**Attach participant/program data sample report**

**Participant/Program Data Sample Report \*Required**

ParticipantProgramDataReport.pdf

**C.5. Use the chart below to show how your agency measures program effectiveness. List goals, activities, and performance measures you will use to evaluate services, facilities, and programs that will be funded by the City. Performance measures can be quantitative and/or narrative.**

**Applicants will be reimbursed funds based upon timely submissions of eligible invoices. These invoices should describe services rendered and should align with the goals and objectives cited here. Where outcomes do not align**

with goals, please be prepared to provide a written summary of shortcomings.

| Stated Program Goals                                    | Program Activities in Support of Goals  | FY 20-21 Previous Year Results  | FY 21-22 Current Year Projected Results  | FY 22-23 Next Year Anticipated Results   |
|---|---|---|--|--|
| Design and build a Black Box Theatre                    | <ol style="list-style-type: none"> <li>1. Consult with architect on design.</li> <li>2. Consult with architect and contractor to develop budget and timeline.</li> <li>3. Initiate fundraising campaign specifically for this purpose.</li> <li>4. Build the BBT</li> </ol> | In 2015 and in 2021 we have successfully completed two significant campaigns raising \$120,00 and then \$2,300,000 for renovation and building. | Fundraising campaign begins January 2022. Detailed design completed by March 2022. Timeline and budget by June 2022.   | See FY 21 -22.<br><br>Construction completed and BBT open in 2023.   |
| Increase Awareness & Attendance                         | Enhanced marketing; new signage at new location; shows targeted to specific audiences; expanded sponsorship program   | New website addresses; consistent e-blasts; show selection  | Opened new location; installing new signage in December 2021; expanding our reach with additional methods of publicity and outreach to populations who typically are not exposed to live theatre productions                   | Implement strategic plans developed in 2021. Continue to track data regarding volunteers, performers, board members.   |
| Expand the number of non-duplicated participants served | Institute a system of tracking such participants; evaluate statistics; provide new main theatre that will increase audience capacity  | Added new audience members based on first-time buyers; increased volunteer base by 10%  | Continue to add new audience members due to diverse theatre productions and diversity of the actors; larger theatre space is welcoming and adding a black box space for additional programming to appeal to larger demographic | Continue to add new audience members due to diverse theatre productions and diversity of the actors; larger theatre space is welcoming and adding a black box space for additional programming to appeal to larger demographic |
| Increase diversity on Board of Directors                | Attend events / workshops designed to identify and attract diverse board membership; actively   | Successfully added two new minority board members; board member participating in racial   | Complete strategic planning process. Send board members to workshops for training. Continue  | Implement strategies identified in strategic planning and workshops. Take advantage of recent  |

|  |   |   |  |  |
|--|---|---|--|--|
|  | promote board membership to new participant pools | equity workshop through the Arts Council; continued programming to encourage minority participation | efforts to identify and recruit new board members. | success in drawing diverse multicultural performers and audiences to WSTA. |
|--|---|---|--|--|

|   | Total Unduplicated Number Served | Total Number Served |
|---|----------------------------------|---------------------|
| FY 20-21 Previous Year Results          | 600                              | 1,000               |
| FY 21-22 Current Year Projected Results | 9,000                            | 15,000              |
| FY 22-23 Next Year Anticipated Results  | 9,500                            | 16,000              |

**C.6. FY 20-21 Program Accomplishments**

During FY 2020 and into early 2021, Theatre Alliance presented 14 outdoor productions, as well as 2 streaming productions, with only one month of downtime as a result of the pandemic. These shows were presented with safety measures in place for the actors and audiences, performed outdoors at our former leased location (behind the building) and at our new location in the spacious parking lot. We completed Phase One of our Homecoming Campaign during this year. We continued renovation of our new performance space during this year and finalized in June 2021. Beginning with our grand opening in August 2021 we have successfully presented four shows in the new theatre which are Something Rotten, Evita, The Rocky Horror Show, and Dreamgirls. These four shows already align with our goals of presenting a variety of programming to draw diverse audiences.

**C.7. FY 22-23 Key Objectives**

Increase annual attendance by 5% (COVID largely impacted our attendance record, so we want to re-build and expand our audience this year); increase repeat donors by 1%; enhance our donor retention and acquisition; increase volunteer participation by 1%. Initiate Phase Two of our upgrade to our performance space, which includes our black box performance space, a memory garden, and further enhancements to the building. Hold our first of what we hope to make an annual North Carolina Rainbow High LGBTQ Theatre Festival in June 2022, to coincide with Pride Month. We hope this will grow over the years into an event similar to the North Carolina Black Theatre Festival. Continue Summer Performances in our parking lot (as began during the pandemic), gearing some towards youth. Ongoing support of Shine!, our branch of programming that highlights the talents of youth who might not otherwise experience performing onstage; with this year’s productions of “Moana, Jr.”

**Attach participant/program data sample report**

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**Documentation**

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 **Participant/Program Data Sample Report**

ParticipantProgramDataReport.pdf



## D. Organizational Capacity

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Case Id: 14435

Name: Winston-Salem Theatre Alliance - 2022/23

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### D. Organizational Capacity

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Please provide the following information.

#### MISSION (5 POINTS)

**D.1. Provide an overview of the organization. Include the organization's mission statement and the major services, programs, and activities provided. How does the proposed project/program help advance the mission of your organization?**

The mission of WSTA is to inspire, transform, and unite the people of the Triad through unique, diverse, and unconventional theatrical experiences. The Vision is to combine a small stage with a big heart to provide outstanding live theater for all people.

Recent strategic planning sessions have identified the following overarching principles:

1. Uphold WSTA as a leading community theatre, recognized for its artistic quality, volume and variety and distinct in its grittiness, originality and risk-taking
2. Unite people through the magic of live theatre – building the WSTA family by welcoming people to discover and live out their passion, championing diversity and inclusivity on and off the stage, and enchanting audiences, artists and volunteers through transcendent experiences
3. Achieve organizational sustainability and solidify WSTA as a cultural hub for years to come – creating systems that best utilize organizational resources, forging partnerships and developing a stable infrastructure for the board and capital assets.

WSTA offers year-round programming. In 2019, for example, there were 128 performances to an audience of more than 14,000 patrons. Shows range from readings to full-scale musicals, from family fare to cutting-edge adult offerings. As with the best of community theater's genre, services offered to the community include those on both sides of the main stage curtain. The chance to be part of a production is just as significant as the opportunity to be entertained by it. During the pandemic and during the construction of our new theatre WSTA continued offering live theatre, in addition to a few live streamed shows, in outdoor venues including the lawn behind our old building and the parking lot of our new building. Through the heat of summer and the cold of winter WSTA continued to produce outdoor shows. Now that our new theatre is built we have, as of August 2021, returned to our indoor schedule and have offered Something Rotten, Evita, The Rocky Horror Show, and Dreamgirls. There are many more shows in line for the coming season.

The Black Box Theatre will be an important and active part of our new facility. It provides a space where experimentation, innovation, and collaboration can flourish. WSTA anticipates producing its own shows such as through the By-The-Book series which presents staged readings to benefit local charities. The space will also help us to open our doors to new interactions with organizations in Winston-Salem who will add to the breadth and diversity of our theatre family. The BBT will provide a flexible and reasonably priced venue where these groups can work. Our goal is to continue, and to expand upon, our tradition of being a theatre whose lights are always on for rehearsals, classes, performances, etc.

**FUNCTION (5 POINTS)****D.2. How long has your organization been in operation?**

38 years

**D.3. How does your organization benefit and serve the City of Winston-Salem and its citizens?**

For nearly four decades, Theatre Alliance has entertained, delighted, and sometimes challenged local and visiting audience members with a broad range of live theater productions, all provided through an active and dedicated volunteer corps and using local talent both onstage and behind the curtains. Citizens are encouraged to audition for roles (of all types), and there are no barriers to prevent almost anyone from being a part of Theatre Alliance's year- round programming. This is community theater at its best!

The American Association of Community Theatre reminds us that “Community theatre enriches the lives of those who take an active part in it, as well as those in the community who benefit from live theatre productions. On either side of the footlights, those involved represent a diversity of age, culture, life experience, and a strong appreciation of the importance of the arts.”

As The City of Arts and Innovation, Winston-Salem has always shown its best side when it stands alongside those who create and sustain arts and innovation. Becoming a direct part of the Downtown Arts and Theater District, Theatre Alliance will add an exciting -- and the most active -- component to the community's theatrical opportunities.

**STRUCTURE (5 POINTS)****D.4. In the chart below, list key personnel and executive staff involved in the proposed project/program.**

| Position Title    | Activities/Inputs  | Total Work Hours Per Week | % of hours proposed to be funded |
|-------------------|--|---------------------------|----------------------------------|
| Artistic Director | General Guidance on planning events in the new Theatre and Black Box space   | 20                        | 0.00 %                           |
| Board President   | Responsibility with the Board of Directors to oversee the design and construction of Theatre Alliance's new Black Box Theatre. | 5                         | 0.00 %                           |
| Architect         | Pro bono development of plans, construction drawings, and work supervision   | 3                         | 0.00 %                           |

**D.5. List all executive staff and their compensation (other than per diem).**

| Executive Staff Name | Title/Role        | Compensation | % of Hours Proposed to be Funded |
|----------------------|-------------------|--------------|----------------------------------|
| Jamie Lawson         | Artistic Director | \$6,000.00   | 0.00 %                           |

**D.6. Attach an organizational chart****Organizational Chart \*Required**

BoardOfDirectorsList.docx

D.7. Please complete the Diversity of Employment and the Employment Profile below. See the [Request for Proposals \(RFP\)](#) for definitions of position types used in the Employment Profile.

**Describe the hiring process and how it is structured to provide the most diverse candidate pool. Best practices for accessing a diverse hiring process and candidate pool include:**

Theatre Alliance has no regular employees. The Artistic Director is given an annual stipend of \$6,000, or the equivalent of less than \$5 per hour based on the estimated number of hours he dedicates to his position at Theatre Alliance. (He is employed full-time at a local company.) He was brought on in 2001 and there have been no hires since then. Therefore, there is essentially no "hiring process" in place at this time. Were it so, it would most definitely be open to the widest potential diversity of qualified candidates.

**Please enter the total number of Full-Time Positions and Employees you have in the table below, as well as the employee's appropriate race/ethnicity and gender identity.**

|                          | Male - White | Male - Black | Male - Other | Female - White | Female - Black | Female - Other |
|--------------------------|--------------|--------------|--------------|----------------|----------------|----------------|
| Executives/Managers      |              |              |              |                |                |                |
| Professionals            |              |              |              |                |                |                |
| Technicians              |              |              |              |                |                |                |
| Office/Clerical          |              |              |              |                |                |                |
| Laborers/Service Workers |              |              |              |                |                |                |
| Total Full-Time          |              |              |              |                |                |                |

**Please enter the total number of Temporary/Part-Time Positions (FTE) and Employees you have in the table below, as well as the employee's appropriate race/ethnicity and gender identity.**

|                          | Male - White | Male - Black | Male - Other | Female - White | Female - Black | Female - Other |
|--------------------------|--------------|--------------|--------------|----------------|----------------|----------------|
| Executives/Managers      | 1            |              |              |                |                |                |
| Professionals            |              |              |              |                |                |                |
| Technicians              |              |              |              |                |                |                |
| Office/Clerical          |              |              |              |                |                |                |
| Laborers/Service Workers |              |              |              |                |                |                |
| Total Part-Time/Temp     |              |              |              |                |                |                |

**D.8.**



**Attach a list of all Board Members AND compensation (other than per diem) \*Required**

BoardOfDirectorsList.docx

**D.9. Number of full Board meetings held during the last twelve months**

8

**D.10. Number of Board's Executive Committee meetings held during the last twelve months**

4

## ABILITY (5 POINTS)

**D.11. If this is an application for new funding, please describe the steps your organization will take to establish an action plan for successful program launch, including appropriate stakeholder training and coordination. Articulate a clear methodology for service delivery within the context of established goals and include a timeline of key action items and approximate dates for delivery.**

Our plan for designing, building, and then using a Black Box Theatre is based upon our successful experience in purchasing and renovating our new main theatre. We will rely on the professional skills of an architect, Andy Lopina, who is a past president of our board of directors, and a long term supporter of WSTA. We will also rely on relationships that we have developed with contractors during the last few years. All of that will be supervised by a Black Box Building Committee and then a Black Box Management Committee who both report to the main board of directors on a regular basis.

Plans and timelines will have to be flexible but a projected timeline is as follows:

Phase 1: Design and building (BBBC=Black Box Building Committee, BBMC= Black Box Management Committee)

### 1. Track Milestones

- o Architect completes design by March 30, 2022 and reports to BBBC
  - o Architect, Contractor, BBBC produce timeline and budget by June 30, 2022
  - o Construction starts by September 30, 2022
  - o Open by June 2023
  - o BBBC will report verbally and in writing to monthly board meetings
2. Fundraising will be ongoing. The timeline above is intended to leave ample time to fundraise before building starts, and then to continue while the construction finishes. Fundraising and payments will be tracked by our treasurer.

Our theatre has ample experience in planning shows and other types of events. Our Artistic Director has more than twenty years of experience planning all aspects of our shows. One of our board members has professional experience as an event planner and has played a key role in running several very successful fundraising events for us during the successfully completed homecoming campaign.

The management of the Black Box Theatre will be the responsibility of the Black Box Management Committee who will report regularly to the board of directors. Among the items that this committee will document and report are the following:

Phase 2: Tracking the use of the BBT by BBMC

1. Annual number of events sponsored by WSTA
2. Annual number of events sponsored by guest organizations
3. For each event keep track of
  - o Volunteer list including directors, cast, crew,... For performances this might include a playbill for example.
  - o Audience numbers and demographics
  - o Description of guest organization
  - o Cost and income
- 4 All of the above can be organized in a simple spreadsheet

To address the overarching long term goals of WSTA, such as building diversity, our board of directors is currently working with the Robert Swain Consulting Company to develop a five year strategic plan. This plan will focus on

identifying specific actionable steps towards aspirational goals. WSTA is also looking for opportunities for board members to attend workshops and conferences where we can gain a deeper perspective as well as specific strategies for meeting our goals. One example includes having a board member participate in a year long leadership training program in Winston-Salem in 2020. Another example includes having a board member attend an arts-focused workshop on equity and diversity in 2021.

**D.12. Describe your organizations' past success with flexibly responding to unforeseen events, which had the potential to negatively impact deliverables. What were best practices learned, if any? How would you successfully use these practices with the proposed program, if necessary?**

Could there be any better example of an unforeseen event than the pandemic? Surviving the pandemic was a particular challenge for WSTA because we were already committed to the purchase and renovation of our new theatre. The first year of the pandemic led to a loss in revenue of more than 80% compared to the previous year. We also lost the option of performing indoors.

We are particularly proud that during the pandemic WSTA continued to offer monthly shows that appealed to a broad spectrum of audiences. We performed on the lawn behind our old property on Northwest Blvd, and we performed in the parking lot of our new property on West Sixth St. We performed in all kinds of weather to audiences both small and large. WSTA helped to keep live theatre alive in Winston-Salem. Our success in doing this relied heavily on our large, dedicated, and determined base of volunteers. Those volunteers are our greatest resource.

Fundraising was difficult during this time. However, we looked at every opportunity for saving money, every opportunity for writing a grant, and every opportunity to encourage the generosity of those who love WSTA. Examples include giving up our lease early on the Northwest Blvd property. Writing multiple grants such as the SVOG, the City of Winston-Salem, Forsyth County, Truist, ... Not all were successful, but enough of them were to help us survive and thrive. As a strategy to encourage individual gifts, in the spring of 2020 the board of directors made individual donations so that we could then run a matching campaign that eventually brought in about \$40,000, which is close to full year's giving during previous non-pandemic years.

Our best practices have been simple. Patience, perseverance, and planning play key roles. Calling upon the collective expertise and enthusiasm of our volunteers and many other supporters has been very important. Hiring consultants at key junctures can be very expensive, but with the help of grants from such organizations as the Winston-Salem Foundation, we have benefited from the advice of experts when it was most needed and valuable. Our current strategic planning process provides an excellent example.

**D.13. How does your program's policies/procedures ensure fair treatment, equitable access, and utilization of benefits for all persons, particularly marginalized and underserved groups and communities (i.e., marketing, outreach, eligibility determination and appeals)?**

WSTA is proud to have always welcomed all members of the community into the organization at every level. As it has continued to learn from statistical data about its community and organizational diversity, the Theatre has become more focused on specific ways to work toward proactively pursuing appropriate goals in this area of operations. Shows continue to be slated with a focus on diverse casting, which require seeking performers outside of the normal talent pool. By doing so, this broadens not only the acting base, but audience, as well as friends and family typically following performers, as do others in the community at large.

Other examples include outreach to non-traditional volunteer opportunities, as well as audience.

Show selection has much to do with broad community interest and attendance. Several productions that speak to this effort include: Memphis, Sister Act, Shrek, and Ragtime. More recently, the November 2021 show in our new theatre is Dreamgirls which is performing to a sold out house and is receiving extremely positive reviews.

WSTA is keen to diversify in more ways than just racial. For example, it makes a concerted effort to bring people with disabilities into the organization. In collaboration with Industries for the Blind, it has helped bring sight- impaired children for a special summer program that allows them to participate in live theater. WSTA also regularly involves all ages in its work, from as young as 5 to as elderly as 75. And WSTA is widely celebrated for its open and accepting attitude of the broadest spectrum of sexual preferences.

WSTA is working to diversify its Board. Representatives have attended “speed dating” events to acquire interested Board members and constantly engage its African- American and Latino performers for potential connections. In recent years WSTA has posted ads seeking diverse Board members in playbills. WSTA has also participated in festivals to garner visibility and interest. In summer 2021 we welcome two people of color to our board. Ongoing efforts in Fall 2021 include working with a consulting group to develop a strategic plan that includes diversity as a central goal. WSTA has also sent a board member to a workshop on equity and diversity and will discuss this board member's experience and recommendations at the December 2021 board meeting.

WSTA is dedicated to continue its diverse programming with a belief that by offering this slate of entertainment, its audience melting pot will grow, as will its overall footprint in the community, which ultimately, has to open the door to more diversity in all its programs and activities. WSTA strives to truly be a community theater which not only welcomes all people, but represents them, as well.

## E. Cost Effectiveness

Case Id: 14435

Name: Winston-Salem Theatre Alliance - 2022/23

Completed by sbr@wfu.edu on 11/19/2021 2:41 PM

Address: \*No Address Assigned

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### E. Cost Effectiveness

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Please provide the following information.

#### BUDGET AND FUNDING (10 POINTS)

E.1. Please complete the table to show the organization's operating budget.

| Expenditures by Program              | Budgeted FY 21-22   | Projected Actuals FY 21-22 | Proposed Budget FY 22-23 |
|--------------------------------------|---------------------|----------------------------|--------------------------|
| Program Services                     | \$308,000.00        | \$308,000.00               | \$323,400.00             |
| Fundraising                          | \$4,000.00          | \$4,000.00                 | \$4,200.00               |
| Management and General               | \$6,000.00          | \$6,000.00                 | \$6,000.00               |
| <b>Total Expenditures by Program</b> | <b>\$318,000.00</b> | <b>\$318,000.00</b>        | <b>\$333,600.00</b>      |

| Expenditures by Category                | Budgeted FY 21-22   | Projected Actuals FY 21-22 | Proposed Budget FY 22-23 |
|---|---------------------|----------------------------|--------------------------|
| Employee Salaries and Wages             | \$6,000.00          | \$6,000.00                 | \$6,000.00               |
| Employee Benefits                       | \$0.00              | \$0.00                     | \$0.00                   |
| Facility Rent and Utilities             | \$84,000.00         | \$84,000.00                | \$88,200.00              |
| Training and Conference Registration    | \$0.00              | \$0.00                     | \$0.00                   |
| Membership and Dues                     | \$0.00              | \$0.00                     | \$0.00                   |
| Travel and Transportation               | \$0.00              | \$0.00                     | \$0.00                   |
| Grants to Individuals and Organizations | \$0.00              | \$0.00                     | \$0.00                   |
| Contracted Fundraising Services         | \$0.00              | \$0.00                     | \$0.00                   |
| Goods Purchased for Resale              | \$0.00              | \$0.00                     | \$0.00                   |
| Other Contracted Services               | \$56,000.00         | \$56,000.00                | \$58,800.00              |
| Other Operating Expenditures            | \$172,000.00        | \$172,000.00               | \$180,600.00             |
| Capital Outlay                          | \$0.00              | \$0.00                     | \$0.00                   |
| <b>Total Expenditures by Category</b>   | <b>\$318,000.00</b> | <b>\$318,000.00</b>        | <b>\$333,600.00</b>      |

| Revenues by Category              | Budgeted FY 21-22 | Projected Actuals FY 21-22 | Proposed Budget FY 22-23 |
|-----------------------------------|-------------------|----------------------------|--------------------------|
| City of Winston-Salem             | \$0.00            | \$0.00                     | \$0.00                   |
| Forsyth County                    | \$0.00            | \$0.00                     | \$0.00                   |
| State of North Carolina           | \$0.00            | \$0.00                     | \$0.00                   |
| Federal Government                | \$0.00            | \$0.00                     | \$0.00                   |
| Admissions/Program Revenues/Sales | \$165,000.00      | \$165,000.00               | \$173,250.00             |

|                                   |                     |                     |                     |
|-----------------------------------|---------------------|---------------------|---------------------|
| Memberships                       | \$0.00              | \$0.00              | \$0.00              |
| Donations                         | \$64,500.00         | \$64,500.00         | \$67,725.00         |
| Foundation Grants                 | \$62,500.00         | \$62,500.00         | \$65,625.00         |
| Interest and Investment Income    | \$0.00              | \$0.00              | \$0.00              |
| Parent Organization               | \$0.00              | \$0.00              | \$0.00              |
| Other                             | \$26,000.00         | \$26,000.00         | \$27,000.00         |
| <b>Total Revenues by Category</b> | <b>\$318,000.00</b> | <b>\$318,000.00</b> | <b>\$333,600.00</b> |

**Describe any amounts listed under "Other Operating Expenditures" or "Other Revenues." Provide details on any specific federal government revenue sources.**

Other Operating Expenditures = general operating; special events; equipment purchases; advertising & promotion; production expenses (set, costume, lights, sound, props); Rights, Royalties/Rentals; Orchestration Rentals

Other Revenues = Playbill Ad Sales; Concession Sales; Merchandise Sales; Raffle Ticket Sales; Photo donations; Rental of the space, equipment, costumes, production.

The Shuttered Venue Operator's Grant that was received has not been included in any of our operations budget figures since it was to help with recovery from the pandemic.

**E.2. Has the City of Winston-Salem provided funding in the past? If so, provide a funding history of the most recent five years of City contributions in the table below.**

| Year | Funding Source | Funding Amount |
|------|----------------|----------------|
| 2020 |                | \$0.00         |

**E.3. Complete the table below to show specific details of proposed City funding and other leveraged funding for the proposed project/program. List each additional funding source for the program.**

| Activity                                      | Funding Requested from City | Funds from Other Sources | Other Funds Source |
|---|-----------------------------|--------------------------|--------------------|
| City  | \$100,000.00                | \$0.00                   |                    |
| Grants  | \$0.00                      | \$100,000.00             |                    |
| Individual Donors:<br>Naming<br>Opportunities | \$0.00                      | \$200,000.00             |                    |
|   | \$100,000.00                | \$300,000.00             |                    |

**E.4. For each activity and line item above, please provide a short but detailed description of how City resources will be used to carry out proposed programming.**

For E2 above, we will soon receive \$100,000 from the City of Winston-Salem to help finish our Homecoming Campaign and the renovation and construction of our new theatre. I made no entry because 2020 was the most recent year allowed in that table.

We currently have a rough estimate from our architect, Andy Lopina, of \$400,000 to cover the cost of the Black Box Theatre. We are hopeful to receive \$100,000 from the City of Winston-Salem to provide a significant step towards meeting that goal.

One example of an additional grant opportunity is the following. Before the Pandemic a \$100,000 grant from the State of North Carolina had been approved in the state's budget. However, there were political delays in getting the budget

approved and then the pandemic happened. We plan to make another request to the state to get that grant.

Now that the pandemic is winding down (we hope!) our fundraising needs to start shifting back to the more standard requests of individuals. The BBT will be an attractive, vibrant, and visible part of our facility so we are hopeful that it will motivate several substantial donations from individuals who care about the arts. Now that we are successfully occupying our new theatre, our prospects of attracting appropriate interest are good. The BBT also offers an excellent naming opportunity.

**E.5. Where another stakeholder or agency is providing non-monetary assistance with a particular aspect of your programming, please provide a short description of those activities and how they will supplement the use of City funds.**

Not applicable

**E.6. If this year's request is different in any way (amount, activities, etc.) from a prior year's request, explain how and why. If you are a new applicant, please describe how you would adjust your project/program if your funding request is not funded at the full amount.**

This year's request is different from our recently funded request. The recently funded request was applied to renovation expenses that opened our new theatre, i.e. our Homecoming Campaign. The current request will help us add the BBT to our new space, which will be a huge improvement, will help us reach some of our larger goals, and will help the community by providing a space for innovation and creativity at a reasonable cost.

If our request is not funded we will simply to continue to work toward the goal as we have with other successful campaigns.

**SUSTAINABILITY (7 POINTS)**

**E.7. Describe the plan to sustain the project/program funding in future years. Include information about other funding sources to leverage City funds requested.**

The presence of the Black Box Theatre, once constructed, will not add significantly to the current costs of running our Theatre. The income derived by additional WSTA events and performances in the space, and the modest rental fees paid by other organizations will contribute to the overall budget and financial stability of WSTA.

Our theatre has been somewhat unusual among local theatres in that we are very active, but we also pay for much of what we do out of earned revenue rather than by the support of grants and foundations and so forth. We plan to continue this model. However, as a result of our Homecoming Campaign and our current strategic planning, we are more capable fundraisers than we once were and we will certainly continue to pursue the support of individuals and organizations that care about the arts.

**BARRIERS (3 POINTS)**

**E.8. Describe any potential programmatic barriers to project implementation (e.g. recruitment or outreach challenges, etc.) and your plans for overcoming them.**

Given our new facility we are in a good position to attract collaborators. However, other organizations are also recovering from the pandemic and we may need exercise some patience as other potential collaborators emerge from the pandemic.

**E.9. Describe any institutional barriers to project implementation (e.g. staff vacancies, pending departures, etc.) and your plans for overcoming them.**

None that we are aware of.

**AVERAGE COST (5 POINTS)**

**E.10. Use the table below to show the average amount of City funds requested per beneficiary to be served during the year and the average total cost of the service per beneficiary to be served during the year (including all funding sources)**

|  |        |
|--|--------|
|  |        |
| Proposed funds from the City for this project: | 100000 |
| Number proposed to be served for the year:     | 15000  |
| Average City funds per beneficiary:            | 6.67   |
| Proposed funds from all sources:               | 400000 |
| Number proposed to be served for the year:     | 15000  |
| Average total funds per beneficiary:           | 26.67  |

## F. Required Documents

Completed by sbr@wfu.edu on 11/19/2021 2:42 PM

Case Id: 14435

Name: Winston-Salem Theatre Alliance - 2022/23

Address: \*No Address Assigned

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### F. Required Documents

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Please provide the following information.

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#### Documentation

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**Code of Conduct/Conflict of Interest Policy \*Required**

Revised By-Laws 5-14-14.pdf



**Submit a copy of the agency's latest 990 Form as submitted to the Internal Revenue Service. \*Required**

Winston Salem Theatre Alliance 990 Public Disclosure copy 2019-2020.pdf



**Organization By-Laws \*Required**

Revised By-Laws 5-14-14.pdf



**Articles of Incorporation \*Required**

WSTA Articles of Incorporation.pdf



**Organization Policies (including personnel, formal non-discrimination, procurement, accounting, etc) \*Required**

Revised By-Laws 5-14-14.pdf



**IRS 501(c)3 Designation Letter \*Required**

IRS 501c3.pdf

**Audited Financial statements or third-party review from 2019 and 2020. \*Required**

WS Theatre Alliance Financial Review June 2019.pdf

**North Carolina Secretary of State - Current and Active Status (<https://www.sosnc.gov/search/index/corp>)**

**\*Required**

NCSOSdoc2.pdf

**Participant/Program Data Sample Report \*Required**

ParticipantProgramDataReport.pdf

**Other**

CombinedFloorPlans.docx

## G. Income Based Projects/Services Only

Case Id: 14435

Name: Winston-Salem Theatre Alliance - 2022/23

Address: \*No Address Assigned

Completed by sbr@wfu.edu on 11/18/2021 11:43 AM

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### G. Income Based Projects/Services Only

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\*\* Complete this section only if you are requesting funds for a Community Development project (for CDBG, HOME and/or ESG funding).\*\*

If the section is not applicable to your project, please leave the questions blank and mark the step "Complete."

**G.1. In the right-hand column below, indicate the number of participants to be served by the proposed project/program within each income category during the year. Click [here](#) to see Winston-Salem income limits by household size.**

| Income Range               | # to be served |
|----------------------------|----------------|
| 0 to 30% of median         | 0              |
| 31% to 50% of median       | 0              |
| 51% to 80% of median       | 0              |
| Greater than 80% of median | 0              |

**G.2. Describe policies, procedures, and criteria for determining who is eligible. Describe the procedures for screening, eligibility determination, intake, assessment and orientation of participants**

## H. Construction/Rehab Only

Completed by sbr@wfu.edu on 11/18/2021 11:52 AM

Case Id: 14435

Name: Winston-Salem Theatre Alliance - 2022/23

Address: \*No Address Assigned

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### H. Construction/Rehab Only

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\*\* Complete this section only if you are requesting funds for a Housing Construction or Rehabilitation project.\*\*  
If the section is not applicable to your project, please leave the questions blank and mark the step "Complete."

**H.1. Describe the proposed project and provide plans. If the project is approved, we will need a detailed work write-up.**

**H.2. Provide a projected timeline for the proposed work.**

**H.3. Describe how the project will be managed, including the contractor procurement process.**

**H.4. Describe the target market, including any special populations to be served.**

**H.5. Describe the services or program you plan to provide.**

**H.6. Describe the property management plan.**

**H.7. List the development team members.**

**H.8. Describe the financial capability of the sponsor/owner organization.**

**H.9. Listing of projects undertaken by principals over the past ten years, identifying project name and address, type of project, and number of units; please note any projects for which local government funding was received.**

| Project Name | Address | Type of Project | No. Units | Govt Funding |
|--------------|---------|-----------------|-----------|--------------|
|--------------|---------|-----------------|-----------|--------------|

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### Documentation

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Development budget that include a detailed sources and uses statement of all funds, including the requested loan from the City, in electronic format, preferably a spreadsheet. **\*Required**

We are not applying for this type of funding.pdf

**Participant/program data sample report \*Required**

We are not applying for this type of funding.pdf

**Market study or other analysis to verify the need for the project. \*Required**

We are not applying for this type of funding.pdf

**Operating pro forma that includes rent and operating cost assumptions and all estimated loan payments, in electronic format. \*Required**

We are not applying for this type of funding.pdf

# I. Emergency Shelter Only

Completed by sbr@wfu.edu on 11/18/2021 11:52 AM

Case Id: 14435

Name: Winston-Salem Theatre Alliance - 2022/23

Address: \*No Address Assigned

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## I. Emergency Shelter Only

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\*\* Complete this section only if you are requesting funds for an Emergency Shelter project.\*\*

If the section is not applicable to your project, please leave the questions blank and mark the step "Complete."

Prior to the beginning of any funding year, any ESG-funded program must participate in the local Homeless Management Information System (HMIS) designated by the Winston-Salem/Forsyth County Continuum of Care, or for domestic violence programs, a comparable database in accordance with HUD's standards.

### Emergency Shelter: Essential Services

| Activity  | Total Budget (\$) |
|---|-------------------|
| Case Management   | \$0.00            |
| Child Care  | \$0.00            |
| Education Services  | \$0.00            |
| Employment Assistance                                     | \$0.00            |
| Job Training  | \$0.00            |
| Outpatient Health Services                                | \$0.00            |
| Transportation  | \$0.00            |
| Legal Services  | \$0.00            |
| Services to Special Population                            | \$0.00            |
| Overhead Costs (limited to 15% of total activity request) | \$0.00            |
|   | \$0.00            |

### Emergency Shelter: Operating Costs

| Activity  | Total Budget (\$) |
|---|-------------------|
| Rent  | \$0.00            |
| Shelter Security  | \$0.00            |
| Fuel  | \$0.00            |
| Equipment   | \$0.00            |
| Insurance   | \$0.00            |
| Utilities   | \$0.00            |
| Food  | \$0.00            |
| Furnishings (limited to less than \$500 per item)         | \$0.00            |
| Supplies  | \$0.00            |
| Maintenance or Minor Repairs                              | \$0.00            |
| Overhead Costs (limited to 15% of total activity request) | \$0.00            |
|   | \$0.00            |

## J. Rapid Rehousing and HMIS Only

Completed by sbr@wfu.edu on 11/18/2021 11:52 AM

Case Id: 14435

Name: Winston-Salem Theatre Alliance - 2022/23

Address: \*No Address Assigned

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### J. Rapid Rehousing and HMIS Only

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\*\* Complete this section only if you are requesting funds for a Rapid Rehousing project.\*\*

If the section is not applicable to your project, please leave the questions blank and mark the step "Complete."

Prior to the beginning of any funding year, any ESG-funded program must participate in the local Homeless Management Information System (HMIS) designated by the Winston-Salem/Forsyth County Continuum of Care, or for domestic violence programs, a comparable database in accordance with HUD's standards.

#### Rapid Rehousing Financial Assistance

| Activity  | Total Budget (\$) |
|---|-------------------|
| Rent Assistance   | \$0.00            |
| Rental Application Fees                                   | \$0.00            |
| Security Deposits   | \$0.00            |
| Last Month's Rent   | \$0.00            |
| Utility Deposits  | \$0.00            |
| Utility Payments  | \$0.00            |
| Moving Cost Assistance                                    | \$0.00            |
| Overhead Costs (limited to 15% of total activity request) | \$0.00            |

#### Rapid Rehousing Services

| Activity  | Total Budget (\$) |
|---|-------------------|
| Case Management   | \$0.00            |
| Housing Search and Placement                              | \$0.00            |
| Mediation   | \$0.00            |
| Legal Services  | \$0.00            |
| Credit Repair   | \$0.00            |
| Counseling  | \$0.00            |
| Information and Referral                                  | \$0.00            |
| Monitoring/Evaluation of Progress                         | \$0.00            |
| Overhead Costs (limited to 15% of total activity request) | \$0.00            |

#### HMIS/Data Collection Budget

| HMIS Activity | City ESG Request | State ESG Request |
|---------------|------------------|-------------------|
| Staff Costs   | \$0.00           | \$0.00            |
| Equipment     | \$0.00           | \$0.00            |
| User Fees     | \$0.00           | \$0.00            |
|               | \$0.00           | \$0.00            |

## K. HOPWA

Completed by sbr@wfu.edu on 11/18/2021 11:53 AM

**Case Id:** 14435

**Name:** Winston-Salem Theatre Alliance - 2022/23

**Address:** \*No Address Assigned

---

## K. HOPWA

---

Please provide the following information.

**Are requesting funds for a HOPWA project?**

No

## Submit

Completed by sbr@wfu.edu on 11/19/2021 2:43 PM

**Case Id:** 14435

**Name:** Winston-Salem Theatre Alliance - 2022/23

**Address:** \*No Address Assigned

---

## Submit

---

I certify that the applicant meets the conditions specified in the application instructions and will be able to carry out the proposed services in concert with these conditions. I also certify that the organization is a certified IRS 501(c)(3) non-profit organization.

Stephen B Robinson

Electronically signed by sbr@wfu.edu on 11/19/2021 2:43 PM

# IDIS Setup

No data saved

**Case Id:** 14435

**Name:** Winston-Salem Theatre Alliance - 2022/23

**Address:** \*No Address Assigned

---

## IDIS Setup

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Please provide the following information.

**Project Name**

**National Objective**

**Activity Number ID**

**HUD Activity Code**

**Project Description**

**Accomplishment Type**

**Initial Application Date**

**Service Area**

**Ward**

**Census Tract(s)**

**Block/Group**

**MWBE**