<table>
<thead>
<tr>
<th><strong>Our Vision</strong></th>
<th>A community of equity, peace, and justice nurtured through the arts.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Our Mission</strong></td>
<td>Teatro Visión creates theater rooted in Chicanx and Latinx experiences to inspire the people of Santa Clara Valley and beyond to feel, think, and act to create a better world.</td>
</tr>
</tbody>
</table>
| **Our Core Values** | • Respect for all  
• Celebration of diversity and positive cultural identity  
• Desire for social justice  
• Artistic excellence  
• Artistic development |
| **Who We Serve** | Teatro Visión is a Chicanx theater company serving the Latinx and other diverse communities of the Santa Clara Valley and the greater San Francisco Bay Area.  
**Teatro Visión’s community:**  
• Is majority Latinx, but inclusive of everyone.  
• Is English-speaking, Spanish-speaking, and bilingual.  
• Is inclusive of everyone with respect to age, race, ethnicity, skin color, class, immigration status, country of origin, language, belief, ability, gender identity and expression, and sexual orientation.  
• Encompasses the greater Bay Area, centered on San José. |
| **Our Programs** | Teatro Visión accomplishes our mission by:  
• Producing and presenting theater that is accessible to all, focusing on Latinx and Chicanx communities and artists.  
• Developing new works of theater through a participatory, community-based process.  
• Offering theater classes and workshops for youth and adults that teach performance as a tool for social change. |
| **Our Goals: FY22-24** | 1) Strengthen Teatro Visión’s year-round presence in our local community.  
2) Continue to create and pursue innovative projects and programs. |
| **3-year Initiatives: FY22-24** | In service of these goals, we plan to:  
1) Strengthen our annual Dia de Muertos production and annual youth production, including experimenting with innovative opportunities for audience creative participation and ancillary events with partner organizations.  
2) Focus on community-based new work development, specifically through *Raíces: el libro de los caminos / Roots: The Book of Journeys* (scheduled premiere July 2022) and premieres of other new work projects (to be determined) every 3 to 5 years thereafter.  
3) Strengthen our community presence beyond East San José through live and virtual performances.  
4) Build and strengthen our artist and technician pool (youth and adult).  
5) Improve our capacity to strengthen our programs by investing in staff and board development and support.  
6) Develop new board-driven strategies to increase donations, sponsorships, and earned revenue to support organizational sustainability. |
Background and Context

Teatro Visión was founded in 1984 by members of Women in Teatro, a statewide network of Chicano theaters. Over the last 37 years, Teatro Visión has commissioned, developed, and/or produced over 60 plays for hundreds of thousands of patrons.

Today, Teatro Visión continues to raise a unique, bilingual voice in Bay Area theater.

- Our annual Día de Muertos production is a high caliber professional theater performance, a performance opportunity for community actors of all ages, and the anchor for a series of events that bring our community together around the themes of the play.
- Our annual youth production offers a cast and crew of young people aged 10 to 18 the opportunity to build skills, confidence, and community connections by participating in a professional theater production.
- Our smaller productions and events, including La Hora del Mitote and events produced in collaboration with partner organizations, build community while highlighting Latinx artists and artists from other underrepresented groups.
- Our community-based new work development programs draw on the diverse voices in our community to create unique, relevant works of theater that position Teatro Visión as an innovator in community engagement and theater creation.
- Our teatro classes teach performance as a tool for social change, strengthening the critical thinking, self-confidence, communication, and problem-solving skills that students need to make positive changes in our community.

Teatro Visión achieved considerable growth between FY2013 and FY2019. Due to the COVID-19 pandemic, our budgets were reduced in FY2020 and FY2021, but all of our programs continued in a safe, socially distant manner. This strategic plan maps out strategies to emerge and grow out of the pandemic, building both on our past successes and on what we have recently learned about remote program delivery.
**Current Programs**

Our annual production calendar includes two major productions. Each October, we offer a Día de Muertos production in the theater at the Mexican Heritage Plaza, which runs for eight public performances and a student matinee over two weekends. We alternate three plays in this slot – our original stage adaptation of *Macario, La Muerte Baila* by Rebecca Martínez and the Milagro Theater Ensemble, and Teatro Visión’s original musical play *Departera*. Each spring, we offer a youth production with a cast of young performers and crew age 10 to 18 in the theater at the Mexican Heritage Plaza. These youth productions run for five public performances and a student matinee over one weekend. During the COVID-19 pandemic, both of these productions were pre-recorded outdoors and offered for on demand viewing online and, in some cases, on CreaTV local television.

Smaller productions are undertaken on a case-by-case basis as opportunities for beneficial, mission-driven partnerships arise. Recent examples include our contribution of a monologue to a First Friday hosted by San José Museum of Art and our current participation in a collective of arts and media nonprofits creating PSAs about COVID health. We also livestream our weekly *La Hora del Mitote*, where our staff chat with artists, activists, and community members and encourage viewers to comment and ask questions.

We prioritize access for all of our productions. We ensure financial accessibility through choose your own price tickets; free ticket offers to foster families, child advocates, and survivors of domestic violence; and discounted student matinees. We ensure language accessibility by providing projected English and Spanish supertitles and offering ASL translation at one performance of each show. During the COVID-19 pandemic, we are offering free access to our pre-recorded performances, with suggested donation levels. All pre-recorded performances are captioned in both English and Spanish. While schools are operating remotely, we are also offering educational access to four of our past productions to K-12 school and colleges.

Our new work development activities include the development of full-length plays and the creation of smaller works. Our new work development is innovative, because we involve our community in the creation process for all of our new works. We have experimented with numerous avenues for community creative participation including in-person workshops; in-person one-on-one interviews; livestreams; fill-in-the-blank prompts by mail, email, social media, and in person; and interactive, collaborative art projects in the lobby. We continue our drive to innovate by trying something new with each project.

We undertake full-length new work development projects every three to five years. We include a smaller community-based creative project as part of almost all of our productions. Our current major new work project is *Raíces: el libro de los caminos*, a new work themed around migration that we are creating in partnership with México City based street theater ensemble La Quinta Teatro. This process began in 2019 and the world premiere is scheduled for July 2022.

Our current classes are all for youth. Intro to Teatro introduces young people age 8 to 12 to theater as a tool for social change. Youth Voice focuses on vocal technique for young people age 10 to 18. Intensive Bilingual Teatro teaches advanced performance skills to young people age 10 to 18 and prepares them to
Teatro Visión
3-Year Strategic Plan
FY2022-FY2024
Approved 6/28/21

audition for our youth productions. Youth Technical Theater introduces young people age 10 to 18 to scenery, lighting, costumes, masks, and puppets. We typically offer each of these classes once per year. Intensive Bilingual Teatro is offered in January or February, immediately before auditions for the youth production. Intro to Teatro and Youth Voice are offered in the summer. Youth Technical Theater was offered for the first time in early 2021. To ensure the financial accessibility of our classes, our policy is to discount or waive registration fee as needed. During the COVID-19 pandemic, all of these classes except Youth Voice continued over Zoom.
Staff and Board

Teatro Visión’s current year-round staff consists of four people, all of whom work part time. This current staff structure reflects progress achieved over the course of our previous strategic plan. Prior to 2018-19, our staff consisted only of Artistic Director Rodrigo García, Managing Director Leigh Henderson, and Production Manager Dianne Vega, all of whom were then classified as independent contractors. In October 2018, our Managing Director and Production Manager were reclassified as employees. In December 2018, we expanded our staff with the hiring of a Community Engagement and Marketing Manager. This position is currently filled by Juanita Berber. In July 2020, our Artistic Director was reclassified as an employee. In addition to our year-round employees, it is now our practice to hire artists working on our productions as temporary employees in order to comply with AB-5.

Teatro Visión’s board has varied between eight and eleven members over the past five years. Our bylaws allow for up to fifteen board members. Our board members are community leaders dedicated to Latinx arts, culture, and community. They offer their expertise to support Teatro Visión in areas such as finance, fundraising, business, public relations, government relations, event management, education, human resources, and the law. Our board is led by an Executive Committee, consisting of our President, Vice President, Treasurer, and Secretary. These officers are elected at each November meeting and serve in their positions for one calendar year, from January to December. Our other standing board committees are Finance, Board Development, Development, and Human Resources. Ad hoc committees formed as needed for special events and projects include Tardeada (our annual fundraiser), Gala (our annual Gala Night party during the run of our Día de Muertos play), Strategic Planning, and Bylaws Review.

* The reclassification of staff as employees in FYE2019 was undertaken prior to AB-5 as part of our organizational growth. In FYE2021, we reclassified our Artistic Director as an employee in order to comply with AB-5.
Location and Facilities

Teatro Visión is based in San José, California. Our office space is in the Issei Memorial Building, located in San José’s Japantown. This location is advantageous in that it is affordable and includes the complimentary use of a conference room for meetings and classes and a garden area for fundraisers and events. During the pandemic, we are using the back yard to film pre-recorded performances. Because the building is shared by San José Taiko, Contemporary Asian Theater Scene, and Japanese American Citizens League, it also helps us connect to other local nonprofits. Our office space, which is approximately 147 square feet, is adequate for our current staff, but allows little room for staff growth.

Our main performance facility is the 500-seat theater at the Mexican Heritage Plaza, located in San José’s Mayfair neighborhood and operated by the nonprofit School of Arts and Culture. We enjoy a partnership with the School of Arts and Culture, through which we are able to use the space at a discounted rate. Although this rate has recently increased, it remains more affordable than comparable venues.

The location of the Mexican Heritage Plaza has advantages and disadvantages for Teatro Visión’s programming and audiences. The population of the Mayfair neighborhood is 70% Latinx, so the Mexican Heritage Plaza is convenient for many of our patrons and potential patrons. However, it is located outside of the downtown center of San José and therefore presents a challenge in bringing in new audiences from other neighborhoods as well as elsewhere in the Bay Area.

Most Teatro Visión rehearsals take place at the Mexican Heritage Plaza, in the gallery or classrooms. These spaces are not ideal, as they are considerably smaller than the stage on which we perform. We are sometimes able to use the rehearsal space at Opera San José, which is large enough for our needs but is only available when Opera San José does not need the space.

Most Teatro Visión classes and workshops are held in classrooms at the Mexican Heritage Plaza. We also sometimes rent space for classes from Red Ladder Theatre Company in San José’s Japantown or hold classes in the conference room at the Issei Memorial Building.

During COVID-19, almost all classes, workshops, and rehearsals are being held over Zoom.

We are currently considering moving our office space to a new space being developed at 38 South 2nd St. in downtown San José by CreaTV as a hub for social justice focused arts and media nonprofits. The planned facility will include office space, rehearsal space, small performance space, meeting and event spaces, galleries, and storage space, all intended for flexible use. If we move to this space, many of our rehearsals, workshops, classes, and smaller events would take place there. Through CreaTV’s involvement, this space would make it easier for us to record and disseminate our events digitally. Other potential tenants in the space include Chopsticks Alley Art, NorCal Public Media, Red Ladder Theater, Spotlight San José, and Works San José. The space may be ready for occupancy as early as spring 2022. An estimate of the increased rent anticipated for this space is included in our pro forma budgets beginning in FY2022-23.
Community

Teatro Visión’s impact comes through our audiences, participants, students, and artists. We see our community as creative collaborators in all of our programs. The initiatives in this plan aim to strengthen our relationships with this community.

* Attendance at both major productions in FY2018-19 was lower than usual due to challenging themes and competing events. Increased attendance in FY2021 was due to free online events, including productions, La Hora del Mitote, and videos offered for educational purposes.
Artists and Technicians

The youth and adult artists and technicians Teatro Visión engages to implement our programs include actors, musicians, dancers, directors, designers, stage technicians, instructors, playwrights, composers, and choreographers.

We have good artist and technician retention, with many artists and technicians working with Teatro Visión for years. Our challenge is finding new artists and technicians who fulfill the particular requirements of our work. One of the initiatives in this plan aims to attract new artists and technicians and support the professional development of artists and technicians with whom we currently work.
Donors

Teatro Visión’s programs are funded by a mix of individual, government, foundation, corporate, special events, and earned revenue.

Teatro Visión’s current and recent major funders include:

<table>
<thead>
<tr>
<th>Foundations</th>
<th>Government</th>
<th>Corporations</th>
<th>Individuals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applied Materials Foundation</td>
<td>National Endowment for the Arts</td>
<td>Bank of America</td>
<td>~ 350 unique individuals</td>
</tr>
<tr>
<td>Castellano Family Foundation</td>
<td>California Arts Council</td>
<td>Heritage Bank of Commerce</td>
<td>Major anonymous individual donor</td>
</tr>
<tr>
<td>Fleishacker Foundation</td>
<td>Santa Clara County</td>
<td>Kaiser Permanente</td>
<td>(most recent gift $45K in FY2021)</td>
</tr>
<tr>
<td>William and Flora Hewlett</td>
<td>City of San José Office of Cultural Affairs</td>
<td>Employer matching gifts from companies including NetApp,</td>
<td></td>
</tr>
<tr>
<td>Foundation</td>
<td></td>
<td>Genentech, Hewlett Packard, and Apple</td>
<td></td>
</tr>
<tr>
<td>John S. and James L. Knight</td>
<td>Various City of San José and State of California elected officials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAP Fund</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>National Association of Latino</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arts and Cultures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Neda Nobari Foundation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shortino Family Foundation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Silicon Valley Community</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Silicon Valley Creates</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employer matching gifts from</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Packard Foundation</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Our Goals: 2020 – 2023

Goal 1: Strengthen Teatro Visión’s year-round presence in our local community.

Teatro Visión’s programming has increased over the past several years. From FY2013-14 through FY2015-16, we produced only our annual Día de Muertos play each year and offered only Intro to Teatro classes for children. In FY2016-17, we began the community-based new work development process for Departera and added a Youth Voice Class. In FY2017-18, we added an annual spring youth production, introduced our Intermediate Bilingual Teatro Class, and instituted a practice of offering creative audience participation opportunities at all of our productions. In FY2018-19, we began our current major new play development project, Raíces: el libro de los caminos / Roots: The Book of Journeys. In FY2019-20, we premiered our portable new work, Luz: A Shadow Play Inspired by Senior Stories, with the intent to tour the production to community venues. Due to COVID, we were unable to tour the performance. During COVID, we have done extensive work expanding our virtual offerings, including introducing our weekly livestream La Hora del Mitote, offering educational access to videos of our past productions to K-12 schools and colleges, and participating in multiple virtual events with partners like San José Multicultural Artists Guild, San José Museum of Art, and Friends of the Levitt Pavilion.

This programming all serves to create deep connections between Teatro Visión and our community that carry beyond the confines of the theater. This presence in our community is the core of Teatro Visión’s artistic and cultural impact. Strengthening this presence serves our mission and sustains our future.

All five initiatives serve this goal.
Goal 2: Continue to create and pursue innovative projects and programs.

Over the past several years, Teatro Visión has established itself as an innovator in community based new work development and community engagement. The numerous ways in which we encourage creative collaboration from our community are unique and forward-thinking. Teatro Visión staff members have spoken on these topics at the national conferences of Dance/USA and Grantmakers in the Arts, on a webinar hosted by Arts Midwest, and at local conferences hosted by Silicon Valley Creates.

Recent innovative projects include Macario, an original adaptation of a classic Mexican film developed with community input; Departera, a new work developed with input from hundreds of community members; Acts of Kindness, an original performance created by students at De Anza College; a collaborative poetry project involving more than 400 community members; a collage of selfies with responses to the prompt “Home means …” created by audiences at our production of The House on Mango Street; a rainbow of encouraging words for LGBTQ+ youth created by audiences at our production of The Transition of Doodle Pequeño; and Luz: A Shadow Play Inspired by Senior Stories, a modular shadow puppet play by a local playwright based on interviews with local elders. We are currently collaborating with México City-based street theater ensemble La Quinta Teatro to create Raíces: el libro de los caminos, a new work themed around migration, though a community-based process in the Bay Area and México.

This focus on innovation, experimentation, and creative collaboration with community is now a defining characteristic of Teatro Visión in our minds and in the minds of our community. It is responsible for much of our recent success. By continuing in this vein, we embrace Teatro Visión’s unique strengths.

All 5 initiatives serve this goal.
3-year Initiatives: 2020 – 2023

**Initiative 1: Strengthen our annual Día de Muertos production and annual youth production, including experimenting with innovative opportunities for audience creative participation and ancillary events with partner organizations.**

This initiative serves Goal 1 by building upon our current production calendar to strengthen community participation opportunities and partnerships with other organizations.

This initiative serves Goal 2 by building upon our established practice of incorporating unique, creative community participation opportunities into our productions.

**Strategies**

a) Offer one of our current roster of Día de Muertos plays each October (*Macario, La Muerte Baila, and Departera*).

b) Select brave youth productions that engage with contemporary issues facing Latinx youth and/or assist educators in teaching a culturally relevant curriculum.

c) As part of each production, experiment with a new way for audiences to participate creatively prior to day of performance and/or in the lobby.

d) Supplement all Día de Muertos productions with smaller events related to the play’s theme produced in partnership with local school or not-for-profits.

e) Secure ongoing funding to ensure the continuation of these productions, particularly the spring youth production, which, prior to the pandemic, was heavily reliant on funding from Santa Clara County.

f) Continue engagement initiatives by board and staff with specific groups within our community, including K-12 students and educators, corporate leadership, Latinx community leaders, Latinx community groups, local colleges, Girl Scouts, Latinx employee resource groups, and LGBTQ+ groups and individuals.
Initiative 2: Focus on community-based new work development, specifically through *Raíces: el libro de los caminos / Roots: The Book of Journeys* (scheduled premiere July 2022) and premieres of other new work projects (to be determined) every 3 to 5 years thereafter.

This initiative serves Goal 1 by providing numerous opportunities for our community to participate in our new work development projects.

This initiative serves Goal 2 by building on Teatro Visión’s unique expertise in community-based new work development.

**Strategies**

a) Develop *Raíces* to premiere in July 2022, according to the current project plan, which has been revised from its original form due to COVID-19.

b) By the end of FY2022-23, conduct an evaluation of the *Raíces* process, including artistic, financial, operational, collaborative, and community aspects of the project, with an eye to applying lessons learned to future new work projects.

c) By the end of FY2023-24, create a plan and timeline for our next new play development project and begin seeking necessary funding.
Initiative 3: Strengthen our community presence beyond East San José through live and virtual performances.

This initiative serves Goal 1 by establishing Teatro Visión’s presence in new physical and virtual locations and offering new audiences the opportunity to connect with us.

This initiative serves Goal 2 by sharing our programs with community in a non-traditional way.

Strategies

a) Continue producing La Hora del Mitote with a variety of artists, activists, and community members from across the Bay Area and beyond.

b) Expand distribution of La Hora del Mitote onto local television via CreaTV.

c) Continue existing community partnerships, such as our current multicultural arts marketing project creating COVID health PSAs.

d) Seek out mutually beneficial event and production partnerships with mission-aligned organizations, such as the potential co-production of Miss You Like Hell, currently under discussion with City Lights Theater Company of San José.
Initiative 4: Build and strengthen our artist and technician pool (youth and adult).

This initiative serves Goal 1 by ensuring we have the access to the requisite talent pool to run our programs.

This initiative serves Goal 2 by extending our innovative approach to artist and technician training and retention.

Strategies

a) Continue to offer Intro to Teatro, Intensive Bilingual Teatro, and Youth Technical Theater once per year.

b) Build upon our new Youth Technical Theater classes with increased technical theater opportunities for young people.

c) Create a defined process of surveying artists and technicians (youth and adult) to ascertain their wants and needs.

d) Strengthen our connections to theater training programs at San José State University, San José City College, and other local schools.

e) Strengthen our connections to youth theater organizations like Audacity and Playful People Productions.

f) Offer specialized training opportunities for artists and/or technicians at least once per quarter, beginning in Q1 of FY2022-23.
Initiative 5: Improve our capacity to strengthen our programs by investing in staff and board development and support.

This initiative serves Goal 1 by ensuring that staff and board have the capacity and resources they need to run strong programs and a strong organization.

This initiative serves Goal 2 by ensuring that staff and board feel safe and empowered enough to be innovative and take risks.

**Strategies**

a) Conduct an annual review of staff salaries.

b) Establish a system of staff and board evaluation and feedback.

c) Create a staff reference guide for policies and professional development opportunities.

d) Create a board handbook specifying expectations and opportunities to participate in programmatic work.

e) Include line items in each annual budget for staff professional development and board professional development.

f) Begin increasing part time staff hours.
Initiative 6: Develop new board-driven strategies to increase donations, sponsorships, and earned revenue to support organizational sustainability.

This initiative serves Goal 1 by ensuring that staff have the capacity and resources they need to reach new audiences and engage the local community in the organization’s mission.

This initiative serves Goal 2 by ensuring that staff and board feel empowered to make bold and progressive programmatic decisions.

Strategies

a) Engage board members in the identification and solicitation of corporate grants and sponsorships and the development of new fundraising campaigns.

b) Explore opportunities to identify and recruit board members with corporate and/or business networks and affiliations.

c) Provide ongoing training opportunities for board members through memberships in organizations such as SVCreates, Silicon Valley Council of Nonprofits, and Somos el Poder in fund development topics including prospect identification, donor solicitation, retention, and more.

d) Provide quarterly updates on revenue sources during monthly board meetings and adjust fund development plans as applicable.

e) Rebrand the Donor Development Committee as the “Development Committee” to manage the implementation of this initiative.
3-year Event Calendar: FY2021-22 – FY23-2024

**FY2021-22**

- **Ongoing:** Weekly *La Hora del Mitote*
- **July – December 2021:** Multicultural arts marketing project
- **August 2021:** Intro to Teatro Class
- **August 2021:** Tardeada fundraiser
- **October 2021:** *Departera* performances and participatory activity
- **December 2021:** Annual review of staff salaries

*December, 2021: Revisit this Strategic Plan*

- **January 2022:** Intensive Bilingual Teatro Class
- **February – March 2022:** Youth Technical Theater Class
- **April – May 2022:** Youth production performances and participatory activity

*June, 2022: Revisit this Strategic Plan*
# Teatro Visión 3-Year Strategic Plan

**FY2022-FY2024**

Approved 6/28/21

## FY2022-23

<table>
<thead>
<tr>
<th>Event</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ongoing</td>
<td>Weekly <em>La Hora del Mitote</em></td>
</tr>
<tr>
<td><strong>July 2022:</strong></td>
<td><em>Raíces</em> performances</td>
</tr>
<tr>
<td><strong>July – September, 2022:</strong></td>
<td>Specialized training opportunity for artists and/or technicians at least once per quarter</td>
</tr>
<tr>
<td><strong>July 2022:</strong></td>
<td>Intro to Teatro Class</td>
</tr>
<tr>
<td><strong>August 2022:</strong></td>
<td>Tardeada fundraiser</td>
</tr>
<tr>
<td><strong>October 2022:</strong></td>
<td><em>Macario</em> performances and participatory activity</td>
</tr>
<tr>
<td><strong>October – December 2022:</strong></td>
<td>Specialized training opportunity for artists and/or technicians at least once per quarter</td>
</tr>
<tr>
<td><strong>December 2022:</strong></td>
<td>Annual review of staff salaries</td>
</tr>
</tbody>
</table>

* December, 2022: Revisit this Strategic Plan *

<table>
<thead>
<tr>
<th>Event</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>January – March 2023:</strong></td>
<td>Specialized training opportunity for artists and/or technicians at least once per quarter</td>
</tr>
<tr>
<td><strong>January 2023:</strong></td>
<td>Intensive Bilingual Teatro Class</td>
</tr>
<tr>
<td><strong>February – March 2023:</strong></td>
<td>Youth Technical Theater Class</td>
</tr>
<tr>
<td><strong>April – May 2023:</strong></td>
<td>Youth production performances and participatory activity</td>
</tr>
<tr>
<td><strong>April – June 2023:</strong></td>
<td>Specialized training opportunity for artists and/or technicians at least once per quarter</td>
</tr>
<tr>
<td><strong>June 2023:</strong></td>
<td>Complete evaluation of <em>Raíces</em></td>
</tr>
</tbody>
</table>

* June 2023: Revisit this Strategic Plan and begin strategic planning for FY2025-FY2027 *
**Teatro Visión**  
**3-Year Strategic Plan**  
**FY2022-FY2024**  
Approved 6/28/21

### FY2023-24

<table>
<thead>
<tr>
<th>Event</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ongoing:</strong></td>
<td>Weekly <em>La Hora del Mitote</em></td>
</tr>
<tr>
<td><strong>July – September 2023:</strong></td>
<td>Specialized training opportunity for artists and/or technicians at least once per quarter</td>
</tr>
<tr>
<td><strong>July 2023:</strong></td>
<td>Intro to Teatro Class</td>
</tr>
<tr>
<td><strong>August 2023:</strong></td>
<td>Tardeada fundraiser</td>
</tr>
<tr>
<td><strong>October 2023:</strong></td>
<td><em>La Muerte Baila</em> performances and participatory activity</td>
</tr>
<tr>
<td><strong>October – December 2023:</strong></td>
<td>Specialized training opportunity for artists and/or technicians at least once per quarter</td>
</tr>
<tr>
<td><strong>December 2023:</strong></td>
<td>Annual review of staff salaries</td>
</tr>
</tbody>
</table>

* December 2023: Revisit this Strategic Plan *

<table>
<thead>
<tr>
<th>Event</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>January – March 2024:</strong></td>
<td>Specialized training opportunity for artists and/or technicians at least once per quarter</td>
</tr>
<tr>
<td><strong>January 2024:</strong></td>
<td>Intensive Bilingual Teatro Class</td>
</tr>
<tr>
<td><strong>February – March 2024:</strong></td>
<td>Youth Technical Theater Class</td>
</tr>
<tr>
<td><strong>April – May 2024:</strong></td>
<td>Youth production performances and participatory activity</td>
</tr>
<tr>
<td><strong>April – June 2024:</strong></td>
<td>Specialized training opportunity for artists and/or technicians at least once per quarter</td>
</tr>
<tr>
<td><strong>June 2024:</strong></td>
<td>Complete plan and timeline for next new play development project</td>
</tr>
</tbody>
</table>

* June 2024: Revisit this Strategic Plan and launch strategic plan for FY2025-FY2027 *
Financial Requirements: FY2022-FY2024

FY2021-22

- 78K (26%) increase in revenue over prior year (factoring in release of temporarily restricted assets.)
  - $0K decrease in revenue for operations includes:
    - $42K decrease in individual giving because we are conservatively budgeting no gift from our anonymous donor, compared to $45K received in FY2020-21.
    - $2K decrease in miscellaneous income due to a one-time dividend received in FY2020-21.
    - $32K increase in foundation grants due to one-time relief grants received for FY2021-22.
    - $7K increase in government grants due to $8K less in total City of San José grants in FY2021-22 and a one-time $15K California relief grant for FY2021-22.
    - $4K increase in loan forgiveness due to a larger second round PPP loan to be forgiven in FY2021-22.
  - $4K decrease in revenue for Dia de Muertos includes:
    - $19K decrease due to California Arts Council grant in FY2020-21 that will not repeat in FY2021-22 due to COVID-related changes to California Arts Council grant programs.
    - $15K increase due to grant from Santa Clara newly received in FY2021-22.
  - $16K increase in revenue for youth production includes:
    - $11K decrease due to California Arts Council grant in FY2020-21 that will not repeat in FY2021-22 due to COVID-related changes to California Arts Council grant programs.
    - $25K increase due to grant from Santa Clara newly received in FY2021-22.
    - $2K increase projected in production-related individual gifts.
  - $62K increase in revenue for Raíces due to the majority of rehearsals for the world premiere occurring in FY2021-22, resulting the release of temporarily restricted net assets.
  - $4K increase in other program revenue includes:
$2K decrease due to end of one-time fund development grant in FY2020-21.
$1K decrease due to end of one-time grant for virtual performances in FY2020-21.
$1K increase due to contract for collaboration with San José Museum of Art in FY2021-22.
$5K increase due to multicultural arts marketing project.
$2K increase due to additional classes projected in FY2021-22.

- $112K (43%) increase in expenses over prior year.
  - $5K increase in year-round staff expenses reflects 5% cost of living adjustment.
  - $39K increase in Día de Muertos expenses reflects differences between fully virtual production of *La Muerte Baila* in 2020 and hybrid production of *Departera* in 2021.
  - $14K increase in youth production expenses reflects differences between fully virtual production in 2020 and hybrid production in 2021.
  - $51K increase in *Raíces* expenses due to the majority of rehearsals for the world premiere occurring in FY2021-22.
  - $3K increase in other expenses includes:
    - $2K decrease due to small projects ended in FY2020-21.
    - $1K increase in class expenses due to additional classes projected in FY2021-22.
    - $1K increase in payroll taxes.
    - $4K increase in worker’s comp.
• $25K (7%) increase in revenue over prior year projections (factoring in release of temporarily restricted assets.)
  o $5K decrease in revenue for operations includes:
    ▪ $15K decrease in foundation grants assumes:
      • $35K of one-time relief grants ending in FY2021-22.
      • $10K grant from Shortino Family Foundation returns to Día de Muertos in FY2022-23 after being applied to operations in FY2021-22.
      • New $30K grant to be secured in FY2022-23.
    ▪ $22K decrease in government grants assumes:
      • $15K one-time grant from State of California ending in FY2021-22.
      • $7K decrease in City of San José operating grant.
    ▪ $22K decrease due to end of PPP loan forgiveness in FY2021-22.
    ▪ $50K increase in individual giving assumes resumption of $45K major anonymous gift and 20% increase in other individual giving.
    ▪ $4K increase in corporate giving from new initiatives.
  o $47K decrease in revenue for Raíces includes:
    ▪ $74K decrease in net assets released from restriction due to the majority of temporarily restricted assets for the project being expended in FY2021-22.
    ▪ $1K increase in individual gifts due to attendees at performances projected in FY2022-23.
    ▪ $26K increase in earned revenue from ticket sales and concessions.
  o $11K decrease in other program revenue includes:
    ▪ $1K decrease due to end of contract for collaboration with San José Museum of Art in FY2021-22.
    ▪ $1K decrease due to end of virtual performances in FY2021-22.
    ▪ $13K decrease due to end of multicultural arts marketing project.
    ▪ $4K increase due to additional classes projected in FY2022-23.
  o $58K increase in revenue for Día de Muertos includes:
    ▪ $1K (20%) increase in individual giving.
$10K grant from Shortino Family Foundation returns to Día de Muertos in FY2022-23 after being applied to operations in FY2021-22.
- $5K increase in government grants assumes:
  - $15K one-time grant from Santa Clara County ending in FY2021-22.
  - $18K California Arts Council grant in FY2022-23 returning to pre-COVID level.
  - $2K grants from elected officials returning to pre-COVID levels.
- $1K increase in corporate giving.
- $41K in earned revenue returning to pre-COVID levels.
  - $30K increase in revenue for youth production includes:
    - $14K decrease in government grants assumes:
      - $25K one-time grant from Santa Clara County ending in FY2021-22.
      - $11K California Arts Council grant in FY2022-23 returning to pre-COVID level.
    - $1K (20%) increase in individual giving.
    - $20K new grant in FY2022-23.
    - $23K in earned revenue returning to pre-COVID levels.
- $27K (7%) increase in expenses over prior year projections.
  - $2K decrease in youth production expenses reflects resumption of normal in-person productions in FY2022-23.
  - $31K decrease in Raíces expenses due to the majority of rehearsals for the world premiere occurring in FY2021-22 and only the world premiere performance in FY2022-23.
  - $29K increase in year-round staff expenses reflects 25% increase due to increased hours.
  - $19K increase in Día de Muertos expenses reflects return to full in-person productions in FY2022-23.
  - $12K increase in other expenses includes:
    - $8K decrease due to end of multicultural arts marketing project.
    - $2K decrease in storage space.
    - $3K increase in class expenses due to additional classes projected in FY2022-23.
    - $14K increase in office rent estimated due to new downtown space (this new expense is partially offset by decreases in various admin and program expenses for venue rental, storage, PO box, etc.)
    - $3K increase in payroll taxes.
    - $2K increase in worker’s comp.
• $23K (-6%) decrease in revenue over prior year projections.
  o $52K decrease in revenue for Raíces due to completion of program in FY2022-23.
  o $21K increase in revenue for operations includes:
    § $7K increase in individual giving assumes continuation of $45K major anonymous gift and 20% increase in other individual giving.
    § $5K increase in foundation grants from new sources or increase of existing sources.
    § $3K increase in government grants assumes 10% increase in City of San José operating grant.
    § $5K increase in corporate giving from new initiatives.
  o $5K increase in revenue for Día de Muertos includes:
    § $1K (20%) increase in individual giving.
    § $4K (10%) increase in earned revenue.
  o $3k increase in revenue for youth production includes:
    § $1K (20%) increase in individual giving.
    § $2K (10%) increase in earned revenue.
  o $1K increase in other program revenue from increased class income.
• $23K (-6%) decrease in expenses over prior year projections.
  o $55K decrease in expenses for Raíces due to completion of program in FY2022-23.
  o $26K increase in year-round staff expenses reflects 20% increase due to increased hours.
  o $5K increase in other expenses includes:
    § $3K increase in payroll taxes.
    § $2K increase in worker’s comp.
# Teatro Visión 3-Year Strategic Plan

**FY2022-FY2024**  
Approved 6/28/21

## Pro Forma Financials: FY2022-FY2024

<table>
<thead>
<tr>
<th>REVENUE</th>
<th>FY20-21 Total Projected</th>
<th>FY21-22 Total Budget</th>
<th>FY22-23 Total Budget</th>
<th>FY23-24 Total Budget</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individuals</td>
<td>$84,334</td>
<td>$44,600 -47%</td>
<td>$97,200 118%</td>
<td>$105,120 8%</td>
<td></td>
</tr>
<tr>
<td>Foundations</td>
<td>$84,806</td>
<td>$25,967 -69%</td>
<td>$87,500 227%</td>
<td>$92,500 6%</td>
<td></td>
</tr>
<tr>
<td>Government</td>
<td>$115,066</td>
<td>$99,091 -12%</td>
<td>$83,000 -16%</td>
<td>$80,200 3%</td>
<td></td>
</tr>
<tr>
<td>Corporate</td>
<td>$7,554</td>
<td>$7,560 0%</td>
<td>$13,785 83%</td>
<td>$13,785 N/A</td>
<td></td>
</tr>
<tr>
<td>Foundations</td>
<td>$125,000</td>
<td>$50,000 -59%</td>
<td>$50,000 N/A</td>
<td>$50,000 N/A</td>
<td></td>
</tr>
<tr>
<td>Total Revenue</td>
<td>$315,200</td>
<td>$160,799 -49%</td>
<td>$213,500 -100%</td>
<td>$213,500 N/A</td>
<td></td>
</tr>
</tbody>
</table>

| Total Budget | $399,894 7% | $377,220 -6% |

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th>FY20-21 Total Projected</th>
<th>FY21-22 Total Budget</th>
<th>FY22-23 Total Budget</th>
<th>FY23-24 Total Budget</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Director salaries</td>
<td>$45,925</td>
<td>$48,221 5%</td>
<td>$61,747 28%</td>
<td>$74,096 20%</td>
<td></td>
</tr>
<tr>
<td>Staff salaries</td>
<td>$51,634</td>
<td>$54,184 5%</td>
<td>$69,425 22%</td>
<td>$67,385 -26%</td>
<td></td>
</tr>
<tr>
<td>Temporary employees - Education</td>
<td>$4,400</td>
<td>$2,400 -45%</td>
<td>$4,650 225%</td>
<td>$6,400 87%</td>
<td></td>
</tr>
<tr>
<td>Temporary employees - Artistic</td>
<td>$15,800</td>
<td>$16,500 18%</td>
<td>$31,500 153%</td>
<td>$41,700 41%</td>
<td></td>
</tr>
<tr>
<td>Temporary employees - Technical</td>
<td>$5,800</td>
<td>$10,150 74%</td>
<td>$17,500 74%</td>
<td>$14,400 -16%</td>
<td></td>
</tr>
<tr>
<td>Temporary employees - Front of House</td>
<td>$0</td>
<td>$2,000 N/A</td>
<td>$3,975 N/A</td>
<td>$2,025 -40%</td>
<td></td>
</tr>
<tr>
<td>Employee benefits</td>
<td>$5,297</td>
<td>$9,216 74%</td>
<td>$11,244 22%</td>
<td>$13,188 17%</td>
<td></td>
</tr>
<tr>
<td>Payroll taxes</td>
<td>$13,785</td>
<td>$16,978 23%</td>
<td>$23,321 37%</td>
<td>$24,629 6%</td>
<td></td>
</tr>
<tr>
<td>Professional services</td>
<td>$690</td>
<td>$600 -13%</td>
<td>$600 0%</td>
<td>$600 0%</td>
<td></td>
</tr>
<tr>
<td>Education contractors</td>
<td>$0</td>
<td>$0 N/A</td>
<td>$0 N/A</td>
<td>$0 N/A</td>
<td></td>
</tr>
<tr>
<td>Marketing contractors</td>
<td>$7,130</td>
<td>$4,600 -35%</td>
<td>$5,000 70%</td>
<td>$5,000 0%</td>
<td></td>
</tr>
<tr>
<td>Artistic contractors</td>
<td>$20,750</td>
<td>$30,000 45%</td>
<td>$2,000 -93%</td>
<td>$0 -100%</td>
<td></td>
</tr>
<tr>
<td>Technical contractors</td>
<td>$9,500</td>
<td>$7,500 -21%</td>
<td>$12,000 60%</td>
<td>$13,000 -8%</td>
<td></td>
</tr>
<tr>
<td>Front of house contractors</td>
<td>$0</td>
<td>$5,490 N/A</td>
<td>$0 -100%</td>
<td>$0 N/A</td>
<td></td>
</tr>
<tr>
<td>Marketing and advertising</td>
<td>$0</td>
<td>$2,000 N/A</td>
<td>$1,500 -25%</td>
<td>$1,500 0%</td>
<td></td>
</tr>
<tr>
<td>Program supplies and venue rental</td>
<td>$10,589</td>
<td>$75,853 616%</td>
<td>$61,917 -18%</td>
<td>$47,650 -23%</td>
<td></td>
</tr>
<tr>
<td>Travel</td>
<td>$1,050</td>
<td>$24,000 2186%</td>
<td>$5,700 76%</td>
<td>$5,700 -100%</td>
<td></td>
</tr>
<tr>
<td>Meetings and events</td>
<td>$9,775</td>
<td>$8,000 -18%</td>
<td>$7,650 -4%</td>
<td>$7,650 0%</td>
<td></td>
</tr>
<tr>
<td>Office expense</td>
<td>$6,639</td>
<td>$11,300 70%</td>
<td>$8,400 -26%</td>
<td>$8,400 0%</td>
<td></td>
</tr>
<tr>
<td>Royalties</td>
<td>$5,760</td>
<td>$4,500 -22%</td>
<td>$4,500 0%</td>
<td>$4,500 0%</td>
<td></td>
</tr>
<tr>
<td>IT</td>
<td>$4,024</td>
<td>$4,024 0%</td>
<td>$4,024 0%</td>
<td>$4,024 0%</td>
<td></td>
</tr>
<tr>
<td>Occupancy</td>
<td>$5,790</td>
<td>$6,650 15%</td>
<td>$18,250 174%</td>
<td>$18,250 0%</td>
<td></td>
</tr>
<tr>
<td>Insurance</td>
<td>$3,750</td>
<td>$4,250 13%</td>
<td>$4,000 -6%</td>
<td>$4,000 0%</td>
<td></td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>$7,397</td>
<td>$5,550 -25%</td>
<td>$3,550 -36%</td>
<td>$3,050 -14%</td>
<td></td>
</tr>
<tr>
<td>Grants to other organizations</td>
<td>$25,000</td>
<td>$0 -100%</td>
<td>$15,000 0%</td>
<td>$0 0%</td>
<td></td>
</tr>
</tbody>
</table>

| Total Expenses | $259,655 | $371,457 43% | $398,760 7% | $375,320 -6% |

| NET OPERATING ACTIVITY | $37,508 | $3,719 -90% | $1,134 -70% | $1,900 68% |
About Teatro Visión’s Planning Process

Teatro Visión’s FY2022-FY2024 strategic planning process began in early 2019 and included a day-long board retreat; Strategic Planning Committee meetings; discussion at meetings of the full Board of Directors; and input from audiences, artists, students, parents, donors, and funders. Originally planned to begin in FY2021, this plan was deferred and revised in response to COVID.

Teatro Visión Board of Directors and Staff

Elena Snyder, President
Controller, Manufacturing Operations, NetApp Inc.

Claudia López, Vice President (*)
CEO/Owner, The Guatemalan Boutique, LLC

Ben Carmona, Treasurer (*)
Software Engineer, PayPal

Peter Allen, Secretary (*, Chair)
Communications Consultant

Crystal Cardenas, At-Large
Learning Business Partner, Facebook

Daisy Castro, At-Large
Community Relations Specialist, Excite Credit Union

Angela Estrella, At-Large
Instructional Coach, Center to Support Excellence in Teaching (CSET), Stanford Graduate School of Education

Monica C. Gavino, At-Large (*)
Associate Professor, Lucas College of Business, San José State University

Anna Kajirian, At-Large (*)
Partner, PricewaterhouseCoopers

Anna M. Licea, At-Large
Operations Manager, Eurest Services / HanaHaus

Blanca Sanchez-Cruz, At-Large
Public Information Representative, Office of Civic Engagement, Valley Water

Juanita Berber,
Community Engagement & Marketing Manager

Rodrigo García, Artistic Director (*)

Leigh Henderson, Managing Director (*)

Dianne Vega, Production Manager

(*) Strategic planning committee member

Participating Key stakeholders

Including former board and staff members who participated in the strategic planning process and resigned before this plan was approved.

Danielle Aguilar  Ugo Badú  Edith Macias  Herminia Ojeda
Tamara Alvarado  Janvier Berber  Rose Mendoza  Karen Park
Andrade family  Charlotte Casey  Carol Moyer  Gloria Torres
Cristal González Avila  Sylvia Kennedy  Ron P. Muriera  Fernando Zazueta
Anonymous (9)