

Doing Things Differently

Stories from innovation initiatives in the arts.



The Innovation Lab for the Performing Arts Oregon Shakespeare Festival



In *Hamlet*, the Players perform for the residents and guests at Elsinore. Photo by David Cooper.

The Innovators

Founded in 1935, the Oregon Shakespeare Festival (OSF) in Ashland, Oregon is one of the largest Shakespeare theaters in the country. The Festival operates three theaters, has a budget of nearly \$25 million, and employs 450 staff and more than 100 actors. During its 38-week season, OSF produces as many as nine plays in repertory, including Shakespeare, rarely explored masterpieces, and contemporary plays. Although Ashland is 300 miles from the nearest urban center, Portland, Oregon (and 600 miles from San Francisco), OSF draws audiences that number 400,000 annually. More than 80 percent of the audience travels over 125 miles to attend a performance, and the average audience member sees three plays in a single visit.

The Innovation

OSF developed *Collaborative Workspaces*, an online communications system with personal, project, organization, and public workspace levels. Currently dedicated to script management, *Collaborative Workspaces* allows everyone involved in developing, revising and managing a script to post, organize, track, discuss and archive revisions through the entire life cycle of a production.



Starting Conditions

OSF's size, relative isolation and demanding production schedule are challenging for its multiple production teams. Directors and designers generally are national and international guest artists who work on-site only briefly at various stages in the production process. OSF was frustrated by conventional information-sharing systems (meetings, fax, phone and email) that neither supported multiple users in distant time zones nor guaranteed the level of participation and inclusion the organization desired. Worst of all, these systems often led to serious errors that resulted in confusion, conflicts, duplication, and time lost. What might be done, OSF wondered, to improve accuracy, efficiency and communication throughout the production process? Beginning with a big idea – to build an internal technological solution that would connect every aspect of production – OSF submitted its proposal to the Innovation Lab. In March 2009, the organization learned it had been accepted.

The Lab

Transformative Moments

OSF applied to the Lab to develop shared online workspaces that would allow artists in Ashland to communicate effectively with partners around the world. In Phase 1 of the Lab, a cross-departmental Innovation Team comprised of artistic, design, production and IT staff worked on defining both the potential scope of the workspaces and the types of company activity that could be represented there. The idea was a bold one, and once the Innovation Team arrived at the Lab Intensive, it struggled to give shape to it. One Team member says, "After four amazing days of generating lots of ideas, we still didn't have a specific focus for our innovation. We knew we had a deadline, and because we are all goal-oriented people, we felt the pressure to get something done."

A critical breakthrough came late in the Intensive retreat when Lab facilitator John Shibley told the group, "You have a cornucopia of ideas, and now you must choose." That challenge provided the opening for the IT members on the Team to discuss the tactical realities of what they had been talking about. "It was immense, complex

and involved scores of stakeholders," says Bruce Wand, OSF's Information Services and Technology Director. As the Team listened to the IT members' presentation, a "light bulb went off" when one Team member said, "I just realized that you guys don't actually use this stuff." Understanding that the IT Department wasn't designing technology tools for its own sake, but rather for other staff in the organization, stimulated the Team to begin thinking about who actually owns technology tools. Hearing that technology was for *them*, Team members grew less suspicious of IT Department motives.

OSF also credits the Intensive with helping the organization realize it could not manage the significant amount of change associated with a full-scale *Collaborative Workspaces* initiative. Once the team accepted that it had to "move from global aspirations to what was possible," it quickly deconstructed the project and carved out a manageable idea – a script management system.

Enthused about their idea, the Team returned to Ashland – only to face skepticism from stakeholders who had not been at the Intensive, but whose buy-in

was necessary to carry the work forward. Many staff and artists at OSF were comfortable in their own domains and were reluctant to make others privy to the information they controlled. When skeptics learned that there could be custom-built filters for information, it became easier to grasp the potential benefits of *Collaborative Workspaces* and move forward with shared intention. Artistic Director Bill Rauch provided timely leadership by fully backing the project and advocating for its potential to improve artistic performance. Wand says, "Every time we faced challenges that took us from the theoretical to the practical, we grew as an organization."

When Shibley visited OSF following the Intensive, he helped the Team identify the attributes of its innovation. He also helped them recognize OSF's inherent operational competence. OSF describes the transformational impact of Shibley's coaching in creating a series of "a-ha!" moments that made everyone quickly understand that innovation was not about the technology itself, but about the organization's ability to apply the practices of making art to the rest of the organization.

Shifts in Assumptions

How did OSF have to alter its thinking in order to achieve these breakthroughs? First, it had to change the way the organization thought about technology. Before the Intensive, many in the organization believed that technology was somehow separate from OSF's core work – that the IT department drove technology projects and imposed its solutions on the rest of the organization. As the work continued on *Collaborative Workspaces*, OSF turned this assumption on end, seeing technology as a user-driven resource that could be organically integrated into the process of making live art. In addition, the organization had to let go of the assumption that it could do everything at once,

and individuals had to overcome the conventional wisdom that their control would be compromised if information were shared and shaped freely through open access.

New Pathways to Mission

Collaborative Workplaces represents a dramatic shift from OSF's past practice. As a Shakespearean theater, OSF grounds its work uniquely in text, and every design and production element refers back to the script. But everyone had not always been on the same page. Previously, when directors made frequent text changes, the stakeholders – actors; props managers; and set, lighting and costume designers – often found themselves working from different versions of the script. Now, the complex process of

editing and refining a script over the period of a year or more is standardized through an online system and template that allow for simultaneous updates, easy identification of changes among versions, the ability to return to earlier versions as necessary, importing or exporting the script to other formats, and locking pagination.

As a result of their experience in the Lab, Rauch and Executive Director Paul Nicholson created a Leadership Team of the 15 most senior managers at OSF to address organizational issues from a systemic perspective. Cross-functional implementation teams have replaced departmental silos, creating new avenues for collaboration, visioning, and project design and implementation.



Top: Hamlet (Dan Donohue) and Horatio (Armando Durán) find themselves at Ophelia's funeral. Photo by David Cooper.

Bottom: Hamlet (Dan Donohue) considers whether to slay Claudius (Jeffrey King). Photo by Jenny Graham.

The Prototype

With funds from the Lab, OSF purchased necessary hardware and software, and developed a prototype of its script management system for use in productions of *Hamlet* and *Measure for Measure*. Using commercial "Final Draft" software that was customized to allow multiple revisions, a cross-functional team led by Wand built a web-based system to support multiple activities, including user access to the current script; distribution of notes when not all actors are at rehearsals; the option of adding notes; frozen pagination, line numbering and scene numbering; identifying changes so as not to affect line delivery; and clear notification of revision date and time. The work was divided into two distinct phases: initial creation, which was limited to directors and playwrights; and distribution, which began with the first rehearsal and provided access to everyone working on the production. The group also worked with OSF's Literary Department to establish a Shakespeare "Final Draft" Template, which determines how script elements, such as character names and dialogue, are formatted.

Following the extremely successful initial prototyping, OSF opted to use it for another play during its 2010 season. Once the season concludes, OSF will do a retrospective analysis of the entire project, with the intention of using the script management system for all plays in 2011.

Obstacles and Enablers

Besides time constraints due to OSF's intense production schedule, the obstacles it faced in the Lab were primarily human. While OSF inherently realized that it had no choice but to grow its technical capacity, the discomfort was palpable as people realized they would have to cede some control. To overcome this, the entire staff demonstrated great patience with each other, working hard to protect relationships as they moved into unfamiliar territory – a fundamental characteristic of the organization that Shibley helped them recognize. Because many staff members have long tenures with the organization, they work efficiently despite the demanding production schedule and without ripping apart personal working relationships. A high level of transparency and a lack of internal politics help.

The Lab kept people positively engaged, and team members used techniques of the Intensive at home to achieve momentum, including visualizing work on white boards, quick follow-up, organized agendas, and "to-do" lists. With no back-up plan (other than returning to the old way of doing things), the group became heavily invested in success. Borrowing the language of theater, one team member says, "If a production of *Hamlet* doesn't go well, it's not like we have another one waiting in the wings. We have to do it well the first time."

Perhaps the most critical enabler of the process was the fact that the innovation was so close to the artistic core of the organization. As Shibley says, "You can't get much closer to the core of

a Shakespeare theater than *Hamlet*." Because Rauch was directing *Hamlet*, the prototype of the script management system had immediate validation.

The Impact

Collaborative Workspaces is an unqualified artistic success, enabling the Artistic Director, actors, directors, dramaturgs, stage managers, and others to update scripts while retaining the actor's notations. The process is more efficient, and there are fewer mistakes. In addition, OSF has learned how to do rapid prototyping, a skill that is essential to continued innovation. Instead of using the standard practice of developing a new technology to a high level before testing it with the client, OSF now makes iterative improvements by testing and critiquing at every stage of development. OSF credits the Lab with unleashing organizational creativity and stimulating what Wand calls "an organizational shift he hadn't seen in his 20 years with the organization."

At the Intensive, the Innovation

Team coined the phrase "collateral benefits" to describe the unanticipated positive benefits of their involvement in the Lab. Most significant among these benefits is a shared recognition that team-based, cross-constituent collaboration creates a powerful engine for innovation. In addition, OSF has developed a new language to describe innovation. "Prototyping," for example, has become "workshopping." More than just a clever borrowing of language, this shift is also conceptual: by importing concepts from the theater into their work as innovators, OSF has been able to transfer its expertise and experience as artists and artisans to their roles as organizational leaders.

Collaborative Workspaces has tremendous potential use in the field. Rauch plans eventually to share the software with colleagues – as a way to make it easier for artists around the world to work together. Just as transferable is what OSF learned about innovation: that a company can connect what it knows about making theater to the process of creating innovation.

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All artwork courtesy of Oregon Shakespeare Festival.

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