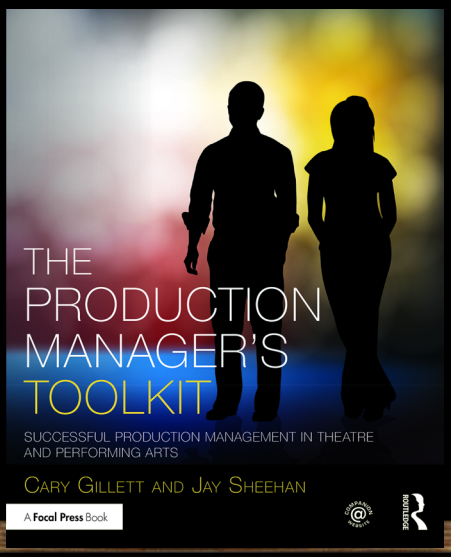
A ROUTLEDGE FREEBOOK

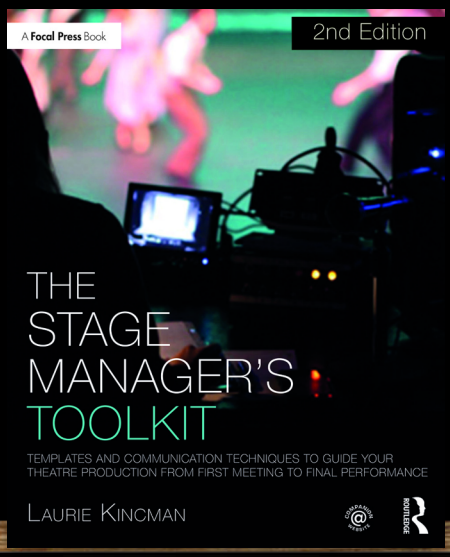
Pre-Production Primer for Theatre

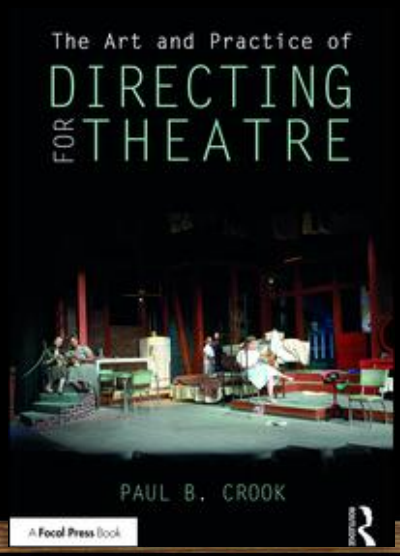
Routledge
Taylor & Francis Group

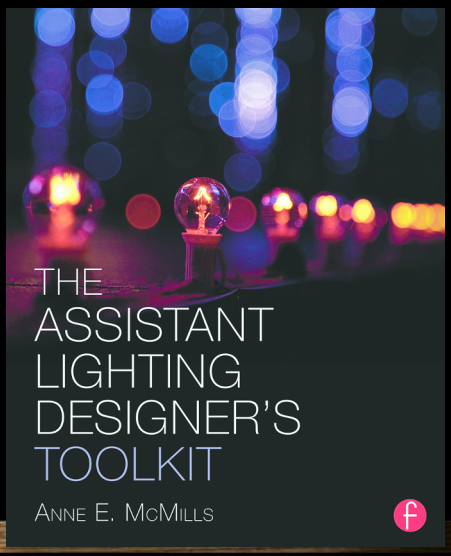
TABLE OF CONTENTS

Theatre & Performance Studies Book Sale









Use discount code PPP16 to get 20% off all Routledge titles!

And find all of our Theatre & Performance Studies titles at:
https://www.routledge.com/performance

Introduction

In the following FreeBook you will find four chapters that focus on different aspects of Pre-Production and Theatre. We hope that these chapters will provide you with a taste of the breadth and depth of our publishing in the field. Below you can read more about both the titles and the chapters we have supplied in our *Pre-Production Primer for Theatre* FreeBook.

As you will see, three of the four chapters are taken from *The Focal Press Toolkit Series* (https://www.routledge.com/The-Focal-Press-Toolkit-Series/book-series/TFPTS), including *The Production Manager's Toolkit*, *The Stage Manager's Toolkit*, and *The Technical Director's Toolkit*. This series offers all the 'insider secrets', paperwork, and day-to-day details that you could ever need for your chosen profession or specialty. Written to cover a variety of levels within each profession, these books provide you with a one-stop-shop to ensure a smooth production process.

Our first chapter is from *The Art and Practice of Directing for Theatre* by Paul B. Crook, who is a Professor of Theatre at Louisiana Tech University in Ruston, LA, where he teaches both undergraduate and graduate directing and acting courses and supervises all student directing projects, in addition to directing for the Department of Theatre. This title will help the young director learn how to discover, harness, and meld both the formation and communication of their vision alongside the nuts-and-bolts of the process. Providing both a practical and theoretical foundation for directors, this book explores how to craft an artistic vision for a production, and sparks inspiration in directors to put their learning into practice.

From this title we have included Chapter 2, *Skills Directors Need*. In this chapter Professor Crook emphasizes three key skills that a director needs: Communication, Respect for others, and being Open-Minded. Within each of these skill-sets he outlines them and how they relate to a director and their role. At the chapter's conclusion he offers both exercises and suggested further reading.

The second chapter is from *The Production Manager's Toolkit* written by Cary Gillett and Jay Sheehan. Cary Gillett has worked as a production manager and stage manager in the Washington DC area for almost two decades, where she teaches production management and stage management at the University of Maryland, College Park, and serves as the production manager for UMD's School of Theatre, Dance and Performance Studies. Jay Sheehan oversees the production management and stage management areas for the School of Theatre, Television and Film at San Diego State University. Jay created and leads the Certificate in Entertainment Management Program for the school and, as the faculty production manager, Jay oversees all aspects of production for the eight-show main stage and student production season. This book offers a comprehensive introduction to the career of production management in theatrical and special events for new and aspiring professionals, given by expert voices in the field.

From this title we have selected Chapter 4, *Planning and Scheduling*. Indeed, a key part of the Production Manager's role is within the elements of planning and scheduling. This chapter will help you through the steps of planning a single show/event or a whole season. Elements within this chapter include potential venues, scripts/project analysis, rights and permissions, and creating show treatments and various kinds of schedules (from rehearsal to strike). This chapter also includes helpful tips and diagrams.

The third chapter is from *The Stage Manager's Toolkit, 2nd Edition* by Laurie Kincman. Laurie Kincman is an Associate Professor in the Department of Theatre Arts at the University of Wisconsin-La Crosse, heading the undergraduate emphases in stage management and arts administration. She also serves as the department's production manager. Her professional credits as a stage manager and production manager include work with the Old Globe Theatre, Malashock Dance & Company, Shakespeare Festival/LA, Opera Pacific, the California Ballet Company, American Stage Festival, and for choreographers Jessica Iwanson and Donald McKayle. This new edition provides a comprehensive account of the role of the stage manager for live theatre with a focus on both written and verbal communication best practices. The book outlines the duties of the stage manager and assistant stage manager throughout a production, discussing not only what to do, but why.

From this title we have selected Chapter 3, *Pre-Production*. This chapter gives practical advice on all aspects on pre-production for the stage manager. For instance, in the section on creating a production calendar there are actual outlines of a production and preliminary rehearsal calendar. It also contains information on analyzing the production and doing a character/scene breakdown. Within the differing sections the 'key users' are laid out along with helpful tips. Whether you need to set up an auditions checklist or formatting a contact sheet, this chapter will provide you with the templates you need.

Finally, the fourth chapter is from *The Technical Director's Toolkit* by Zachary Stribling and Richard Girtain. Zachary Stribling has worked professionally in theatre for more than twenty-two years, and has been teaching at the university level for thirteen years. He has served as Technical Director for the Utah Shakespeare Festival, Faculty Technical Director at the University of Central Florida, and Visiting Assistant Professor of Technical Production at the Florida State University. Zak is currently a Lecturer and Faculty Technical Director at the University of Kentucky. Richard Girtain has served as Technical Director at several nationally and internationally recognized theaters throughout the country, including the Guthrie Theater, Utah Shakespeare Festival, and FSU/Asolo Conservatory for Actor Training. Richard is currently the Technical Director for the Juilliard School at Lincoln Center. This is the first book to address every nut and

bolt of this multifaceted job, guiding you though the step-by-step processes of technical direction and the responsibilities of the TD in the mounting of a theatrical production

From this title you will find its first chapter, *Communication, Collaboration, and Flexibility: The Mores of Success*. Here they lay out the three-pronged 'stool' of being a successful Technical Director. Sections within outline the varying responsibilities, advice on leadership, and a proposed method of problem solving.

Note to readers:

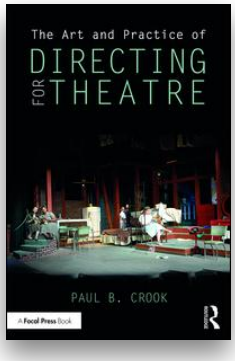
As you read through this FreeBook, you will notice that some excerpts reference other chapters in the book – please note that these are references to the original text and not the FreeBook.

Footnotes and other references are not included. For a fully referenced version of each text, please see the published title.

CHAPTER 1

Skills Directors Need

1. Skills Directors Need



Learn more:

The skills a director needs are many and varied; ultimately, everything that you learn in your study of theatre (and your practice of theatre) becomes a tool in your toolbox. Creative skills, composition skills, organizational skills . . . all of these are important and all should be honed each chance you get. However, there are three primary tools that every successful director must have and must continually work on to build and increase. None of the three is more important than the others; all require your constant attention. Because of that, I find it helps to think of them represented in the shape of a triangle.

For each of these skills, I could easily say, *this* is the most important one, but they are truly equal. Because of that, we could begin our discussion of them at any point on the triangle, but let's start at the top and work our way around clockwise:

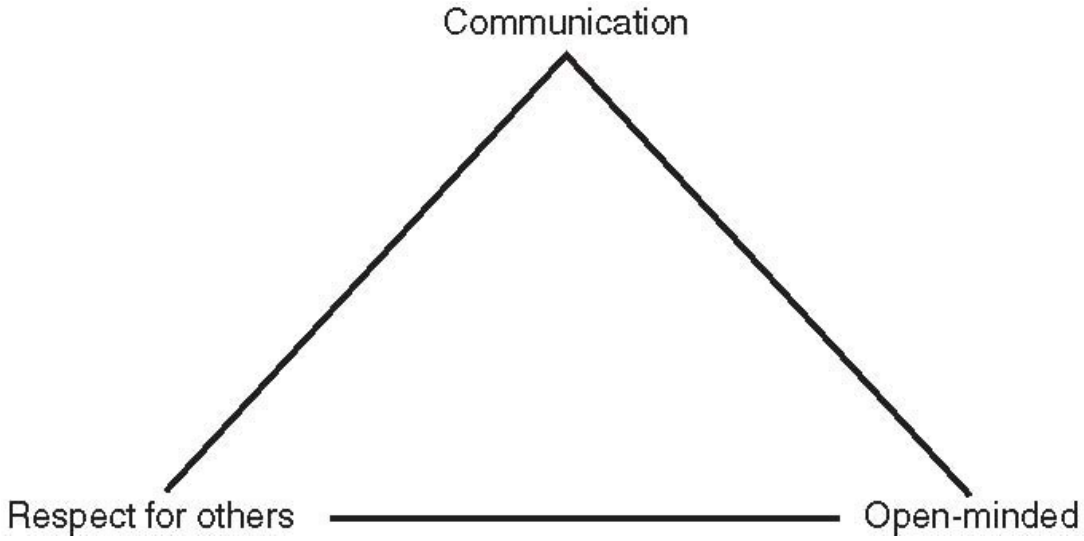


Figure 2.1 Skills of a director

Communication

Remember our quote from *Hamlet* in Chapter 1? "Speak the speech, I pray you . . ." was Hamlet communicating his directorial desires to the Player King. In Anton Chekhov's *The Seagull*, Treplev tells Nina, "We should show life neither as it is nor as it ought to be, but as we see it in our dreams." Showing your dream, telling your story, and displaying your directorial vision are all impossibilities if you cannot communicate them to your production team, cast, and crew. Whether in design meetings, rehearsals, or PR

activities, everything you do as a director is going to demand excellent communication skills. And while there is no better way to work on communication skills than to practice communicating, there are three important keys you can think about to make sure you are communicating in the most effective way possible: phrasing, style, and knowledge/excitement.

Phrasing

Picture this scenario: You are directing *Bus Stop* and you've had your initial design meetings with your production team to talk about your concept for the show. You go into your next meeting and your scenic designer begins to show her design. You look at it and say, "You need to put the kitchen up left and not down right." She looks back at you and says, "No." Now what? You are most likely angry at her flat refusal and considering what you need to say next to *make* her do what you want. You are at an impasse that seems divisive already . . . and you've barely begun the process! Where did you go wrong, and how can you solve the problem? Better yet, how can you make sure that the problem doesn't crop up? It's all in the *phrasing*.

Look back at the previous paragraph and see what you notice about the director's phrasing; it should jump out at you once you look for it. Notice that, in the example, you've told the designer what she *needs* to do. By phrasing it that way, you've automatically set up a confrontational atmosphere that will be tough to overcome. When you are a director (or, really, in any leadership role), remember that questions are your friends. If, in our example, you phrase your initial desire as a question ("Could the kitchen be up left, instead of down right?") you have begun a discussion . . . as opposed to an argument. Either the designer, when answering your question with a "No," will go on and elaborate her response, or if not you can follow up with the question, "Why not?" It is only then that you have the opportunity to learn that the water and electric hookups are behind the stage-right proscenium arch, and since you want your kitchen to be practical, it needs to be as close to the hookups as possible. Ahhhhh! A logical and good reason to roll with this altered vision to the design.

Designers aren't going to say "no" just for the sake of it. Remember that they work practically just as much as they work creatively and there will almost always be a logical reason for the answers they give you. If you are communicating in questions as opposed to declarative statements, it makes the collaborative process a much smoother one. I once directed a show and, after a technical rehearsal, was having drinks with one of the actors, who was also a director. He marveled at the fact that the set designer (with whom he had worked several times) and I were sitting next to one another throughout the rehearsal. He lamented that he could never get that designer to sit with

him in rehearsals. I mentioned that I had often seen him going into the scenic studio of the theatre and *telling* the designer what he needed to do, whereas I would go in and chat with the designer each day—and not just about the show. We talked about current events, politics, sports, music, and other things, as well as the show. And because we had built a personal relationship with one another, that carried over to our professional relationship.

Style

"Communication" is a huge concept, with a range of aspects. It is important to know the style of communication you use most often, to make sure you are communicating in the most effective manner. Psychologist Claire Newton says, "Good communication skills require a high level of self-awareness. Once you understand your own communication style, it is much easier to identify any shortcomings or areas which can be improved on," so that you can communicate effectively in any situation. Newton and other analysts identify five primary communication styles: assertive, aggressive, passive-aggressive, submissive, and manipulative. While there aren't many submissive directors out there (at least, none who consistently get rehired), we have most likely all worked with directors who fall into the other four categories. Let's briefly examine the remaining four, in reverse order.

Manipulative directors are those who work indirectly to get what they want. They often secretly give notes to one actor, while ignoring the others, or pit members of the production team against one another, thinking that that will achieve the best results. The manipulative director will use guilt trips to get actors to come in and work outside of rehearsal, or pout when a costume designer won't change something when asked. Above all, manipulative directors rarely addresses an issue directly; instead they go around and around the matter at hand to accomplish what they want.

Passive-aggressive directors do a lot of complaining. They whine about not getting as much assistance from the front of house staff as all of the *other* directors get. They are sarcastic when giving notes to actors, often in (what they think is) a joking tone. Passive-aggressive directors will often feel put-upon, and make those feelings known, when producers or PR directors ask them to do something extra to promote the show. While passive-aggressive types might work well with a dictatorial artistic director or producer, they ultimately want everyone to know how difficult they have it and to feel sorry enough for them to give in to their way of doing things.

Aggressive directors are the "my way or the highway" types. They think that the best way to get actors, designers, and others to do what they want is to tell them what to do. And if that doesn't work, then they do it again—only *louder*. They may be great

directors to have on board for meeting deadlines, but they can be difficult to deal with on a day-to-day basis. Rehearsals under an aggressive director typically involve a lot of shouting and a lot of arguments. Aggressive directors are usually hyper-competitive and believe that bullying and intimidation are the things that motivate those around them. Aggressive directors are loud, belligerent, and supremely confident that their way is not just the right way to do things, but the *only* way to do things.

Assertive directors are . . . direct. They are clear with their production team and actors on what they need and understand that having a conversation about those needs will result in the most positive outcome. They are also open to discussion and new ideas, realizing that there is always a different way to do things. Assertive directors lay out their plan and work to make sure that everyone is on board with it, while being flexible enough to recognize that plans often need to change, based on circumstances. Assertive directors make sure that everyone knows what is expected of him or her, and hold each person (including themselves) accountable.

After looking at the above list, it's pretty easy to tell which director you would like to work under, isn't it? Obviously, as presented above, assertive directors seem to be the best, and that is generally true. However, it's a fact of life that different situations call for different communication styles, and being able to utilize a little of some of the other three styles can be to your benefit. In a former life (long ago), I was a high school football and baseball coach. While the general opinion of coaches may be that they are all aggressive-style communicators, that isn't true of the best ones. The best coaches understand that you have to choose your communication style based on the situation and the people around you. Coaches have a saying about players: "You have to know whether to kick 'em in the butt or pat 'em on the butt." Though most coaches probably aren't thinking in terms of communication theory, they are recognizing the fact that everyone responds to different types of motivation, hence, communication.

Some actors want a director to tell them precisely what to do onstage: "Take four steps down left, look over your shoulder at him, and say the line then." Some want a director to leave them alone, essentially: "Enter up-right on this line" (with no other direction to follow that). Most actors fall between those two extremes. Some like to be given notes specifically and directly, while some get very self-conscious about notes and are afraid getting a note means they're "bad." Ultimately, you, as the director, need to understand what type of actors you have in your cast, and adjust your communication style, so that you can be most effective when talking with each of them.

Knowledge/Excitement

How can you communicate with anyone if you don't know your topic? That seems a rather basic and simple question, but you would be surprised how often it gets overlooked. The more you know about your show, the more research you've done (remember, research and reading. . .), the better prepared you will be to speak about your show. It doesn't matter if you're meeting with your production team, starting rehearsals, or speaking at the local Rotary Club luncheon, it is your responsibility to know your show inside and out.

Imagine you're directing a production of *The Hot l Baltimore*, and in rehearsals, the actress playing April asks you why her character seems to be so protective of Suzy. How are you going to answer that question? You need to know all the characters, all their relationships, all the situations they find themselves in. Only then will you be able to have the discussion with the actress in an effort to answer her question. If you don't have a deep, comprehensive knowledge of the play, any response you give will be shallow and won't do justice to what you are all trying to create.

Knowledge isn't enough; you have to be excited about your play. If you want people happy and excited to be working on this production, it starts from the example you set. When your cast and crew see and hear the passion you have for the show, that translates to them. Of course, you also want audiences to be excited about coming to see the show, and that excitement can be built through your promotion and marketing efforts when they see your feelings about it. When you are passionate about your project, it makes it so much easier to talk with others about it, because you want them to be passionate about it as well!

Communication is essential to your role as a director. If you are unable to communicate your vision, your goals, and your passion in an effective style, then the show will never have a chance at getting off the ground. But communication is a two-way street, and isn't just about you speaking. The other side of the coin is *listening*, and that's where our second point on the triangle comes in: being open-minded.

Open-Minded

If we accept that theatre is the most collaborative of all of the art forms, and that the director's job is the most collaborative one in theatre, that raises the question: How do I collaborate? It seems like an awfully basic question, but it's one that we don't often think about, unprompted. In an interview with Arthur Bartow, American director and co-founder of Arena Stage Zelda Fichandler said:

> We have to teach ourselves and each other the art of collaboration, 'co-laboring' in order to express a collective consciousness—the fundament of the act of making theatre. . . It's necessary to do more . . . to think as ourselves and also as the others, to permit the perceptions and needs and priorities of the others to mingle with our own while preserving our separateness.
>
> **Zelda Fichandler**

When you approach a project in an open-minded fashion, what you are really doing is, as Fichandler says, allowing the "perceptions and needs and priorities of the others" join your own.

Too often, I see students begin a project, get a Great Idea, and then put that idea in a stranglehold and never let go. No matter how many times teachers, peers, or other collaborators make suggestions, they feel like their G.I. is *perfect*! Because of that, they see any critique as a personal attack and any suggestion for change as an attack against the Great Idea. This attachment to the Great Idea blinds them to other possibilities and serves as a barrier to collaboration, growth, and development. The G.I. can come in many forms: it might be a concept for a show, a casting choice, or perhaps it's a bit of staging. Regardless of the focus of the G.I., directors have to understand that what they do is all about looking at possibilities and making choices. Ultimately, it's not about making "right" or "wrong" choices, but distinguishing between choices that are "better" and "worse."

Let's say you are directing a production of *Disney's Beauty and the Beast*, and you've come up with a Great Idea for the ending fight between Gaston and the Beast, and the Beast's transformation into the Prince. You've decided that, in the final beat of the fight when Gaston stabs the Beast, their grappling can carry them over the edge of the castle wall platform, and the Prince can emerge from behind it after some nifty transformation lighting effects. Not only have you creatively solved the problem of how to accomplish the transformation, you've come up with a visually stunning ending to the fight. Brilliant! So, while you are staging this G.I. with your fight choreographer in rehearsal, the scenic designer (who has been watching rehearsal and taking notes) mentions to you that when she designed the castle set, she specifically visualized the final fight taking place on a different platform on the other side of the stage—one where the sculpting at the top is going to be different and, perhaps, allow for better sightlines for the fight. Now, the director who wants to protect the Great Idea at all costs will immediately dismiss the idea because it's not his blocking—his vision—his Great Idea. The smart director, though, the one who is open-minded and truly wants to "co-labor," will try it out. This director realizes that the designer may have a point, and it's worth spending some time in rehearsal looking at the fight in a different location to see if that choice might work better. Ultimately, whether you decide to change it or go

back to the original staging, you've opened yourself up to the possibility of change. And by being open-minded to trying your scenic designer's suggestion, you've shown that you truly understand the spirit of collaboration. As an added benefit, you have also demonstrated the third quality on our triangle: respecting others.

Respect

As previously mentioned, any of the three points on the triangle could be considered the most important one, but this third point is certainly the most important when it comes simply to being a good human being—and really, that's what this is all about. Being a director means that you are a leader—whether you think of yourself as one or not—and good leaders must recognize the worth of others and show them respect. The best leaders are never "me first" kind of people. In Sophocles' play *Antigone*, Haemon tries (unsuccessfully) to make this point to Creon: "Do not believe that you alone can be right./The man who thinks that,/The man who maintains that only he has the power/To reason correctly, the gift to speak, to soul—/A man like that, when you know him, turns out empty." You never want to be an "empty" director, thinking you are always right. Be a collaborator in every sense of the word, recognizing and respecting the talents and worth of everyone around you.

A trap that so many young directors (and many older ones as well) fall into is trying to do *everything*. Sometimes this is attributable to habit, as many directors start by gathering a bunch of friends together to put on a play ("Dad's got a barn—let's do a show!"). They get used to being director, stage manager, set designer, costume coordinator, and box office manager all at once. Because of that, when they begin working with an actual production team and a real budget, they still fall into old habits of trying to do every job—even though those jobs now belong to someone else! Sometimes, this is attributable to a fear that others won't be able to do things exactly the way the director envisions it. And sometimes, directors falling into this trap don't even realize that they're doing it; they're just so excited that they're running over everyone, almost unknowingly. Imagine you have been hired by the XYZ Theatre to direct *Fences*. So, you've been hired. Excellent! You know that, in hiring you, the producer has made a wonderfully insightful and intelligent decision by recognizing your many talents and offering you the job. And that is exactly the point: you have to trust that the same wonderfully insightful and intelligent producer who hired you exercised that same insight and intelligence in hiring everyone else! You must respect that they know how to do their jobs and trust them to perform exceptionally.

It's not just about showing respect for a person's job, but for the actual person. The production assistants, concession workers, ushers, box office assistants, carpenters,

stitchers, and everyone else who works in the theatre all do it because they love it. They want to be a part of it. If you've made it this far in your academic life and are still pursuing theatre as a career choice, then you understand that it's not a choice people make for the money. People choose to go into theatre because they have passion for it—because the need and drive to be a part of an artistically creative process is so strong that they are willing to take on any role to be involved. Understand that about people: recognize that the same passion that fuels your soul is there in those around you. Remember, as Dr Seuss tells us, "A person's a person, no matter how small!"

Exercises and Suggested Reading

Exercises

1. Read Claire Newton's full article on the five communication styles. You and a partner each make two lists: On one side, list your own behavioral characteristics (verbal and non--verbal) and conclude with what style of communication you most often use. On the other side, list the characteristics and draw the conclusion for your partner. Be honest. Share your lists with each other and discuss how you each see yourselves and each other. If there are discrepancies, discuss them.
2. You and a partner choose one of the scenes listed below. On your own, sketch a scenic design for it and then write out your blocking for the scene in the script. After you have finished, compare what you have done with your partner, and find a way to meld each of your visions together into one shared idea. Make sure to consider how you communicate your vision to your partner, and *listen* to your partner's vision. Discuss the process with the class.

   a. "The Balcony Scene," Act II, scene ii from *Romeo and Juliet* by William Shakespeare

   b. Brick and Big Daddy's "Mendacity" scene from Act II of *Cat on a Hot Tin Roof* by Tennessee Williams

   c. The final scene of *Miss Julie* by August Strindberg

   d. Part I, scene i of *Desire Under the Elms* by Eugene O'Neill

Suggested Reading

Bartow, Arthur. *The Director's Voice: Twenty--One Interviews* (New York: Theatre Communications Group, Inc., 1988).

Chekhov, Anton. *The Seagull* (Chicago, IL: Courier Press, 2013 (1896)).

Inge, William. *Bus Stop* (New York: Random House, 1955).

O'Neill, Eugene. *Desire Under the Elms* (Reseda, CA: D'Arts Publishing, 2010 (1924)).

Shakespeare, William. *Romeo and Juliet* (1597, available online).

Sophocles. *Antigone* (*c.*441 bc, available online).

Strindberg, August. *Miss Julie* (1888, available online).

Williams, Tennessee. *Cat on a Hot Tin Roof* (New York: Dramatists Play Service, 1958 (1954)).

Wilson, August. *Fences* (New York: Plume, 1986).

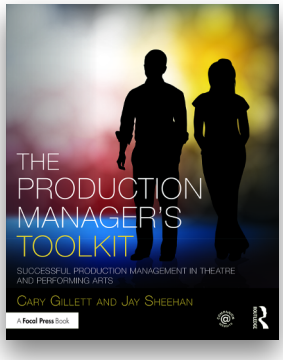
Wilson, Lanford. *The Hot l Baltimore* (New York: Dramatists Play Service, 1998 (1973)).

Woolverton, Linda (book), Ashman, Howard and Rice, Tim (lyrics), and Menken, Alan (music). *Disney's Beauty and the Beast* (New York: Disney Theatrical Licensing, 1993).

CHAPTER 2

Planning and Scheduling

2. Planning and Scheduling



The following is excerpted from *The Production Manager's Toolkit* by Cary Gillett and Jay Sheehan.

Learn more:

Shows and events do not come together overnight. They require special long-term planning and scheduling to make them successful. Depending upon the type of event, the planning may start six months to five years in advance. This chapter will help you through the steps of planning a single show/event or a whole season.

The Role of the Production Manager in Season Selection

Every organization is different, and therefore their approach to selecting the work will also differ. Whether it is one performance or a series of events spanning a few months, there is likely a process by which those events are selected. If you are lucky, the organization values the input of the production manager and invites you to the season selection table. If such an invitation is offered, do not turn it down. If by chance you work for a producer who would rather shut their door and not open it again until the season has been chosen, then you might have your work cut out for you. Nevertheless, find a way to insert yourself into the process. The outcome can only benefit you, your staff and the organization as a whole.

By being a part of the season selection process, production managers have a chance to comprehend the ideas as they are developing. They can add production insight and start to prepare for how they will be produced. It is a wonderful way to connect with the artistic leadership of the organization by understanding what types of projects they want to do and why. You can bring a large amount of knowledge and forethought to the season consideration that many others cannot. Production managers have a special understanding for knowing how projects will come together and the resources necessary. If a project is being considered that is way outside the means of the organization, it is best to speak up early rather than coping later with a decision that is not implementable. This is not to say that the production manager's job here is to shoot ideas down; quite the opposite. Bringing challenges to the forefront allows them to be considered and hopefully solved. Perhaps a show requires more cast, crew and designers than any you have previously produced—that means more money. The solution could be that the overall season is reduced by one project to accommodate for these additional costs.

You must be an informed member of the season selection process, which means doing the work. This begins with reading the proposals or scripts, seeing performances elsewhere that are being considered, doing research on previous productions of these shows and talking to people about them. Careful consideration of each project is necessary. Here are some questions you should ask:

- How many people will this project take to produce (directors, designers, cast, crew, etc.)?
- Will this project fit into our standard production period? (Think about the time it will take to build, rehearse, tech, etc.)
- What are the design elements, and how large or small are they? (Will a unit set suffice or will the set need to show multiple locations? How many total costumes are required?)
- What is the time period of the show? (Finding and/or building period items can be more costly.)
- What special rehearsal requirements might be necessary? (Example: Does the cast need to learn to roller skate or play the banjo, or both?) Will the show have specific community outreach attached to it?

Creating a Season

Often, seasons will be built around themes or ideas to connect them in a specific way. Some examples of this might be new work, current topics affecting the community, adaptations, etc. Sometimes the theme can just be an entry point for those choosing the season, and therefore it is not a consideration for marketing of the season. This is fine. Some organizations have a template for each season, so they know they are choosing two works from the company's repertoire, one new work, one workshop, etc. Some organizations choose their season based on what they think their audience wants. That may mean choosing crowd-pleasing titles or selecting shows that appeal to the demographics of their region.

Venues

Along with the selection process, one must also consider where these projects will be presented. Different venues have different opportunities and challenges.

- *Proscenium theatre:* Since the 19th century, this has been the most typical location to produce a show. Most Broadway and regional theatres still use this type of venue. The benefits are plentiful—lots of options for backstage storage (be that in the wings, traps below the stage or fly loft), the audience location is predetermined and therefore does not require much attention (other than sightlines), lots of options for special effects, etc.
- *Flexible theatre:* A black box or other flexible theatre space does not have permanent seating, so they can be configured in any way of your choosing (as long as it meets the approval of your fire marshal; see chapter 8 on safety). You

could choose a proscenium type configuration or maybe go with three-quarter thrust, arena or alley. One challenge to consider is labor and time, as it will take both to set up the venue as you wish.

- *Non-theatrical venue/found space:* Any space can become a performance venue—the lobby of a building, an art gallery, a hotel ballroom, a tent in someone's backyard. One big challenge with these venues is that none of the "normal" theatre areas or equipment exists and will need to be created—dressing rooms, backstage space, control booth, positions from which to hang lights and speakers, etc. You also need to give thought to the audience experience. Where do they enter/exit? Where do they sit? Or do they sit? Where do they go to the bathroom?
- *Outdoor venue:* Who says it has to be inside? Plenty of organizations produce outside in the summer months. Outdoor venues can vary from proscenium type theatres with permanent seating and a roof (or sometimes no roof) to a hillside or parking lot with nothing permanent other than what you choose to provide. The biggest challenge by far with outdoor venues is the weather. It is very unnerving to have this very large element of the experience completely out of

Figure 4.1 Liam Vincent and Danny Scheie in *The Mystery of Irma Vep* at the California Shakespeare Theatre

Credit: Photo by Jay Yamada

your control. Contingency plans should be considered from the beginning of the project—what do we do if it's too hot, or too cold, or raining? Often, an alternate indoor location is a good back-up plan. Another big consideration with an outdoor venue is the schedule. If you perform at night, then you will need to have technical rehearsals occur then as well. Some outdoor venues plan overnight electrics calls to get the lights focused.

- Other important things to consider regarding venue:
- Does your organization own this venue? Do you already have approved access? Will you be required to rent it?
- Are you sharing this venue with others during any part of the process?
- How old is the venue? Has it been properly kept up? Is the venue already outfitted with seating, lights, sound equipment, etc., or will you need to provide those things?
- How much time will you need in the venue? (See Production Schedule later in this chapter.)

Script/Project Analysis

Once the project has been selected, it is helpful to do a detailed analysis. This allows you to understand everything this project will require and help you plan out the budget and schedule. If there is a script, that is the best place to start. Here is what to look for:

- People
    - Creative team requirements: director, choreographer, musical director/conductor, designers, writers
    - Support staff: fight choreographer, dialect/vocal coach, movement coach, accompanist
    - Stage management: stage manager (SM), assistant stage manager (ASM), production assistants
    - Cast requirements: gender, age, skillset
    - Production staff requirements: set, paint, props, costumes, lights, sound, projections, etc.
    - Crew requirements: backstage, wardrobe, lighting, sound, projections, etc.

- Design elements
    - Set/paint/props
    - Costumes

    - Lighting
    - Sound/music
    - Projections/video
- Special considerations
    - Effects: flying, fire, water, fog, haze
    - Children and/or animals

What if there is no script? Sometimes there is not, because it hasn't been written yet or the project will be devised. Maybe all you have is a list of characters and a synopsis, or maybe you don't even have that. The best thing to do here is assume the worst-case scenario—lots of people and lots of stuff. It's important to start having conversations with the playwright, director or choreographer as soon as possible so you can know the direction the show is headed. It's always best to stay ahead of the game, but sometimes you just have to keep up. For a project such as this, you might need to schedule yourself into the rehearsal room so you are part of the development process.

Rights and Permissions

Before deciding upon a specific show or project, it is important to find out if you can get the rights to produce it. Any published script will require permission from the publisher. Here are a few of the biggest theatrical rights houses at present: Dramatists Play Service (www.dramatists.com), Samuel French (www.samuelfrench.com), Tams-Whitmark (www.tamswitmark.com) and Musical Theatre International (www.mtishows.com). Their websites will walk you through the process of getting the rights to produce their shows. The rights houses will need you to provide information about your organization and your plans to produce the show. Common required information includes ticket prices, expected box office revenue, venue capacity, dates and number of performances. If a show is not published, rights are often still necessary but need to be acquired directly from the playwright, librettist, composer or their representation—agent, lawyers, etc.

If a show is being created by your organization, the question of rights will be determined by the content. If it is unique material generated by the company, then you do not need to gain any permission. If, however, it is based on an existing story or uses content from another source (song, movie, book, etc.), then permission is needed. These permissions will require you to track down the publisher, agent or other representative. A good way to start is an internet search of the title to see if you can find who owns the rights to the content. Then you will need to find the right contact person for that organization. It's best to start this process early, as you never know how long it will

take. Your project is usually not a priority for them. You will need to ask early and often.

Once rights have been secured, you will be required to pay royalties. This could be a flat fee or a percentage of the box office or both. Every rights house is different, so it's best to do your homework when applying for the rights, so you are aware of costs and procedures for payment. The more popular the show, the more expensive the royalties. Musicals are notoriously expensive, sometimes costing thousands of dollars for just a few performances, whereas straight plays that have been in circulation for a few years might only cost a few hundred dollars. If you are working in an academic environment, the costs can sometimes be less, though not always.

Gaining the rights to produce a show does not allow you to do whatever you wish with it. Making changes to published material is not allowed without permission. If you wish to adapt the script or to cast it non-traditionally, it is best to ask permission first (not forgiveness later). Rights houses have been known to shut down a production when they discovered that these types of adjustments had been made without their knowledge. It is also illegal to photocopy a script without permission. Most rights houses will require you to purchase or rent the exact amount of scripts, librettos or scores you will require to produce the show. A rental package will need to be returned in the condition it was received, or fees will be charged. Works that fall into the category of public domain do not require rights. Determining whether or not a work is part of the public domain is a complicated process, as there are many rules and laws about copyright, and most differ from country to country. Here are a few basic public domain rules:

- All works published in the United States before 1923 are in the public domain.
- Many works published in the United States from 1923 to 1963 are also in the public domain, as new laws about renewal went into effect after that time.
- Most countries follow an international copyright treaty known as the Berne Convention that was put into effect in 1886, which requires copyright protection on all works for at least fifty years after the author's death.

It's important to understand the Fair Use Privilege, as well, as it is another way to use materials without obtaining a copyright. This can be helpful if you are looking to use clips of video or songs, short length of text, etc., to make a larger and original artistic work. The challenge here is the vague nature of the law and how people may interpret it differently.

When Is Use a Fair Use?

The following four factors must be considered to determine whether an intended use of a copyrighted work is fair use:

- The purpose and character of the work
- The type of work involved
- The amount and importance of the materials used
- The effect of the use upon the market for the copyright work

These factors are intended to be a highly flexible set of general guidelines. The courts do not apply them in a mechanical or numerical way. For example, not all factors are equally important to every case and it's up to the courts to decide what weight to give them. This makes determining whether a use is fair use a highly subjective and unpredictable exercise.

— Excerpt from Stephen Fishman's *The Public Domain: How to Find & Use Copyright-free Writings, Music, Art & More*

TIP—When in doubt about copyright—talk to a lawyer!

Show Treatments

Now that the season has been selected, the production staff will want to know more about the projects you will be producing. The production manager should plan to create "treatments" for each project that include the details that most people will want to know. These treatments should include the artistic lead on the production, casting, venue, dates, unique production challenges and, often, a synopsis, if it's not a well-known show.

Show treatment examples:

THE MATCHMAKER

by Thornton Wilder

Directed by Paul Allen

October 11–19 in the Trey Theatre

Setting: 1880's NYC

Cast size: 9 men, 7 women

Description: Old merchant hires a matchmaker to help find him a wife and ends up

marrying her in the end

MOLIERE IMPROMPTU

Translated and adapted by Rinne Groff

Directed by R. Wilson Matthews

November 8–16 in the Cradle Theatre

Setting: Versailles, 1665

Cast size: 8 men, 5 women

Description: Moliere and his troupe in rehearsal are surprised by an unannounced visit by the King, who demands a performance. Done in Commedia dell'Arte style

Other items of note: Masks will be designed and built

Creating the Schedule

The nice thing about producing shows and events is that there is no guessing the date when the project needs to be completed. Be it a single event or a show that runs for months, we all know that it needs to be ready by opening night. So in order to create the most effective schedule, you should start with the opening and work backwards. The next two questions to ask are about time: How much time do we need, and how much time do we have? If you are lucky enough, the answer to these two questions will match, but that is rarely the case. Due to budget or venue availability, you may have to make accommodations to make the schedule fit into a specific timeframe. A common shift recently in professional theatre has reduced the number of weeks of rehearsal from five down to four or sometimes even three weeks. This change has been made for monetary reasons and does prove challenging for the director and performers. Any sacrifice you make will affect someone. You, as production manager, will need to weigh the options and come up with the schedule that serves the overall production best.

Deadlines

Lots of information will be required from individuals to make a production come together— scripts, designs, casting, etc. An important part of the beginning of the planning process is to determine the deadlines. It's best for the production manager to make the first draft of the deadlines based on what they know of the season, work load and time frame. Once the draft is done, it can be shared internally with the shop heads and, perhaps, artistic leadership for feedback. Once the deadlines are set, they need to

be communicated to the people who are expected to meet them. Depending upon the items and the people involved, further negotiation might be necessary. However, once the deadlines are final, everyone needs to stick to them.

It's best to have multiple steps to the deadlines. Let's take a costume design as an example. Once the director and designer have met and discussed the concepts, a "preliminary" deadline should occur to allow everyone to touch base and check to see if their ideas are aligned. Often, there will be additional work on the part of the designer, and a "final" design conversation will need to take place. The next step is a "hand-off" deadline where the costume design pack-age is handed over to the costume shop for work to begin. Typically, the shop will "cost out" the package (more on this in chapter 6), and if it is not achievable within a given budget, a "revision" of the package will also be requested. All of the phases (preliminary, final, hand-off and revisions) should have deadlines before the entire production process began. Further deadlines might be necessary, as well. If the costumes are being built, then certain fabrics and accessories will be due from the designer. If it's a new work and casting decisions are decided later in the process, you might need a deadline for final casting so the costumes can be completed on time. As you can see, it can be a complicated process, and deadlines help keep it on track.

Of course, unforeseen things happen; we need to remain flexible, and contingency plans may need to be developed. If, after a costume deadline, an unexpected script revision changes the necessities of the costumes (or any other aspect of the show), then we will have to make some hard choices. Do we make the changes and push back the final deadline? Do we choose not to accept the new script version because the changes requested are not possible? Or do we meet somewhere in the middle? The art of compromise should be one of the production manager's essential skills.

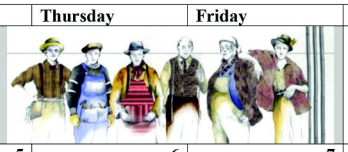
Production Meetings

The best way to check in on the progress of the team and insure deadlines are met is to schedule production meetings around those deadlines. A production schedule can be extremely complex, so looking for moments of intersection can be very helpful. If you know a particularly challenging deadline is approaching, call a production meeting to check in with everyone and see how things are going. Perhaps challenges can be solved all together, or if not, at least you have a heads up that this deadline might not be met. (For more on production meetings, see chapter 5.)

Rehearsal Schedule

In most cases your stage manager and director will take on creating the rehearsal schedule. However, the stage manager might not start until a week before rehearsals begin, so you may need to have a hand in crafting the basic schedule until they join the project and fill in the details. The first thing to determine is when rehearsals will begin. You may need to decide how many weeks you can afford to hire your performers or, if they are volunteering their time, how much you can reasonably ask them to give you. Once the start date is set, you'll need to figure out what times rehearsals will occur and when there will be time off. If this is a union show, there is guidance found in the union rules. The Actors' Equity Association (union of actors and stage managers in the United States) has very specific rules for how many hours per day can be rehearsed and how many hours there must be between the end of one rehearsal and the beginning of the

A Midsummer Night's Dream — Rehearsal Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
SEPTEMBER 						1
2 Rehearsal 10am-4pm	*Labor Day* 3 ACTOR DAY OFF	4 Rehearsal 5:30pm-10pm	5 Rehearsal 5:30pm-10pm	6 Rehearsal 5:30pm-10pm	7 ACTOR DAY OFF	8 Rehearsal 10am-6pm
9 Rehearsal 10am-6pm	10 Rehearsal 6:30pm-10pm	11 Rehearsal 5:30pm-10pm	12 ACTOR DAY OFF	13 ACTOR DAY OFF	14 Rehearsal 5:30pm-10pm	15 Rehearsal (Stage) 10am-6pm
16 Rehearsal (Stage) 10am-6pm	17 Rehearsal (Stage) 5:30pm-10pm	18 Rehearsal (Stage) 5:30pm-10pm	19 ACTOR DAY OFF	20 Tech Rehearsal 5:30pm-10pm	21 Tech Rehearsal 5:30pm-10pm	22 Tech Rehearsal 10am-10pm
23 Tech Rehearsal 10am-8pm	24 ACTOR DAY OFF	25 Dress Run 5:30pm-10pm	26 Dress Run + Photos 5:30pm-10pm	27 **Opening Night** **Show 7:30pm** **Reception**	28 **Show 8pm**	29 **Show 2pm** **Show 8pm**
30 **Closing Night** **Show 2pm**	**Notes:** Only the fairies are required to attend **aerial** and **dance** rehearsals. Aerial rehearsals will be held at Joe's Movement Emporium					

Ruth Anne Watkins, Stage Manager — Updated: 8/4/2012 (RAW)

Figure 4.2 Rehearsal calendar example

next. One day off per week is the norm, and often this falls on Mon-day. The rehearsal venue might determine scheduling, as well. It might be that your rehearsal space is also

a classroom used during the day, so it is only available in the evenings.

Build Schedule

Trust in your shop heads to get the build schedule created. Your technical director, costume shop manager, master electrician, scenic charge, props master and other department heads will be able to advise the best course of action for their respective shops. The design of the show is the primary guide for the build schedule. Often, certain items will have to be created first, as other items build upon or relate to them. Labor is the next big determining factor. Working with the shop heads and/or crew chiefs to figure out how many people you have and how long it will take them to complete the necessary tasks is a complex puzzle. Finally, we need to know when the items need to be delivered to the stage so they can be used for technical rehearsals, or possibly even before. Many production managers do not have their own staff and shops and are often required to bid out items to be built. A large number of commercial shops exist throughout the country. You will also find individual artisans willing to be hired for a single job or project—such is often the case in props and costumes. The advantage you have with these types of entities is that you get to determine the time and the money that can be allocated and then look for the right person who can deliver what you request. (More about bidding to outside vendors in chapter 7 on hiring.)

Load-in Schedule

The load-in schedule is one big puzzle. Each shop will need time to get their part of the show into the venue, and the production manager (with some careful consideration and knowledge) must orchestrate it all. Again, your shop heads will provide the most useful information about loading in, so trust them to give you guidance. It may sometimes be necessary for you to weigh in and advise or decide between competing priorities. The design of the space or show will be the best starting place for this schedule. One element might need to be installed first because another element may block access once it is installed. For example, it's often common to start with light hang in the theatre so the electricians have a clear stage to fly in the linesets used for electrics or maneuver ladders or lifts around the space without having to worry about the set. However, light focus cannot occur until the set is in place, so that will have to occur later in the schedule. Often, elements will cross over between departments and will require multiple steps and personnel, a TV monitor, for example, that lives attached to the wall of the set. The scene shop may need to install the wall first before the video department can install the monitor, but the scenic artist has to come back and finish

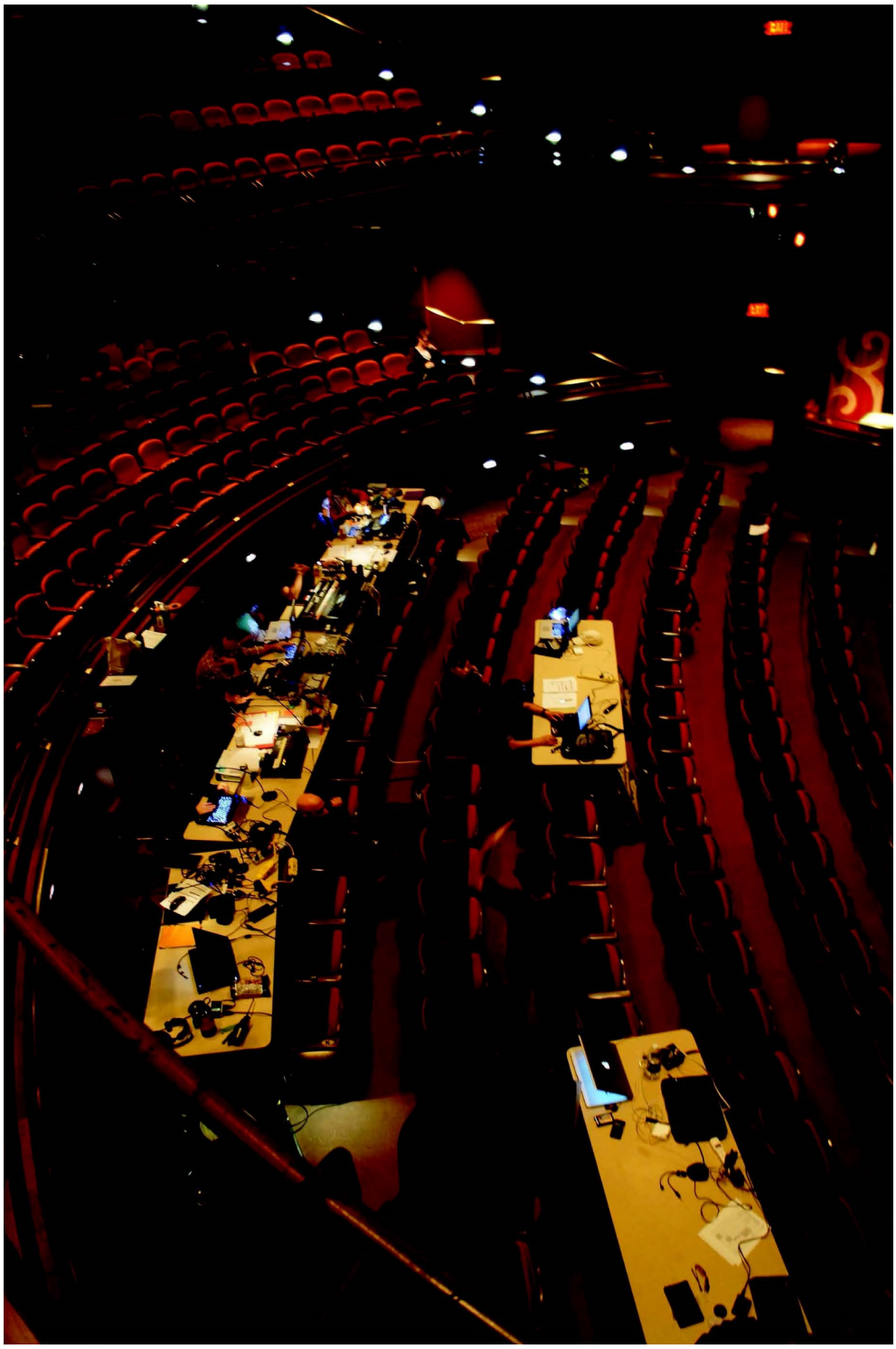


Figure 4.3

Credit: Photo by Ryan Knapp

the paint job once the monitor is in. The bottom line is that the elements in the venue should be complete by the time technical rehearsals occur.

Tech Schedule

The tech schedule is best broken down into four phases—rehearsals onstage, technical rehearsals, dress rehearsals and notes periods.

- Rehearsals onstage: Whenever possible, try to give the performers and director and/or choreographer time in the space and on the set before tech begins. This time is invaluable and can save time later in tech. It's nice to begin the first rehearsal onstage with a walk-through guided by the technical director. This way, the performers get a chance to ask questions and understand how things were meant to be used. In an ideal world, the per-formers would have enough time onstage to space through the show, restage any necessary sections and get a full run-through in before tech.
- Tech rehearsals: This is where we add all the pieces together—lights, sound, costumes, automation, video, performers, etc. It is often described as the most inefficient and frustrating part of the process. Everyone is together in the room working on their aspect of the production. Everyone more than likely thinks their aspect is the most important. To determine how much time tech will take requires an understanding of all of the elements being put together. (A show with one set, no quick changes and no video will take a lot less time to tech than one with four sets, thirty quick changes and three projectors.) Another important element to understand is how the tech will be run. Will there be a paper tech, where the director, designers and stage manager sit down and talk through the whole show and all of its cues? Will it be a cue to cue, where each section of the production with a lighting, set or sound cue in it is worked, but then sections without cues are skipped? Will you dry tech everything first without performers and then attempt a run? Every show will require something different.
- Dress rehearsals: This is where the full show with all its elements is run through in order, preferably without stopping. Everyone learns a lot from doing the show in real time (stage managers, crew, performers, designers, directors/choreographers), so having at least a couple full dress runs before you have an audience is very important. Make sure there is time to do so in the schedule. Often, one of these dress rehearsals is when production photos are taken. It's important everyone knows this is coming so they can do their best to get everything completed in order to have the best photos possible.

- Notes period: This is the time the designers and shop staff take to refine the work and make fixes or changes based on what has been discovered during tech and dress. The notes period overlaps tech/dress, occurring at times when the venue and production elements are not in use for rehearsal. In the case of scenic, paint, lights, sound and video, these notes will need to take place in the venue, making for a complicated scheduling puzzle. Part of the production manager's job during the tech/dress period is to create a schedule for the next day based on the desires, needs and priorities of each person. It's important to understand who can work together and who needs the venue to themselves. Oftentimes, notes will not all get accomplished and will be pushed to the next day because time ran out.

Strike Schedule

It's important to know in advance how much time you have in the venue following the final performance. This will not only help you plan the strike schedule but may also inform how much stuff you can put in the venue to begin with. If you only have four hours post-show for strike versus four days, that will drastically change the scope of the physical production. If the production has a long run, you can wait until after opening to begin the strike planning, but if it is a one-night event, you'll have to be thinking about strike at the same time as you are planning everything else. Similar to the load-in schedule, you will need to take guidance from your shop heads and crew to figure out the best way to get everything out. Some items might need to be struck first to ease the exit of others.

Does the Show Have a Future?

Hopefully, you will know well in advance if the show will have future performances either at your venue or another. However, it is possible to find out after strike that the show will be remounted in a future season. In any case, preparation of show paperwork and proper archives is always necessary. In most cases, the stage manager for the show will be expected to turn in their production book, which contains all of the information about the show from the blocking to the cues. The production manager should make sure this book is turned over in a timely fashion and double-check that it includes all necessary elements. In addition to the info from the SM, it's important to collect all of the design paperwork (plans, renderings, lists, etc.) as well as any schedules, contact sheets and other paperwork you created. In the end, a full package of anything and everything to do with the show should be archived so as to help a future production. If

you know in advance that the show will be moved or remounted, then it's important to make sure the physical production remains intact, is properly stored, and is able to be trans-ported. If the production move is happening shortly, it might fall to the production manager to plan for the storage as well as the transportation of the items. It's important to communicate the post-show plans to your team so that items can be engineered and built to come apart and be put back together easily as well as fit into the mode of transportation. Storage and transport cost money, so it's imperative that funds be allocated toward this as soon as possible. Finding the proper storage and transport can take time, so the sooner you know about this possibility the better!

Managing the Physical Resources

Whether it be lumber, tools, light boards, speakers, couches or petticoats, each item we use needs to be managed and cared for. This becomes doubly important if you have very few resources or an abundance of them. Creating a system where you can track

Figure 4.4 The College-Conservatory of Music at the University of Cincinnati
Photo by Adam Zeek, www.zeekcreative.com

what items you have is a critical step toward success. If you are lucky enough to have the money and space to house a large stock of properties, you should take the time to inventory and log what you have so items can be properly found and used when needed. If you don't know what you have, chances are good you'll buy something a second time without realizing it and waste money.

> **TIP**—Another important thing to consider with physical resources is maintaining them. With tools like a table saw or a sewing machine, investing in their upkeep costs much less than constantly needing to replace them. Create a schedule where items are serviced and cleaned. Ideally, this would be in the off season, when the tools are not in use. Make sure you budget for this maintenance.

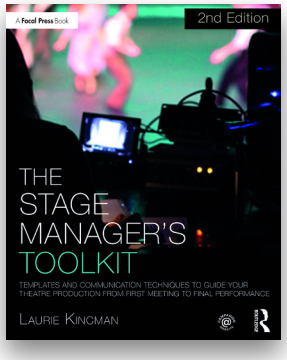
Planning and scheduling are at the heart of what production managers do. Seeing a production from its inception all the way to completion can be a very fulfilling experience. Time, preparation and careful thought are the keys to success. It's never too early to begin to plan your next show or event. However, as with all things production management, stay flexible—your careful planning will often need to change. Keep those plan Bs (and Cs) in the back of your head in case they should be needed!

> "In any one five-minute period, you need to be thinking of what's happening now to the next five years . . ."
>
> - Perry Silvey, former Director of Production for the New York City Ballet

CHAPTER 3

Pre-Production

3. Pre-Production



Learn more:

The stage manager's work on a production begins with a self-orientation to the script, the physical production, and the team with whom he or she will be working. In order to most successfully facilitate discoveries during rehearsal, it is important that the stage manager collect as much information as possible in advance. This work will allow you both to provide answers and to know what additional questions need to be asked.

Pre-Production Tasks

- Read and analyze the script.
- Collect information on the production.
- Prepare initial lists and breakdowns.
- Create a prompt book.
- Meet with the director.
- Participate in auditions.
- Prepare the rehearsal room.

In an academic theatre department, the stage manager may receive an assignment at the end of one year for a show that will happen the following year. Despite the upcoming vacation, you will inevitably be around your future team members and may be asked to perform some preliminary duties for the show right away. This might be a simple task such as script distribu-tion, or it might be some of the detailed prep work contained in this chapter. Although much of your work will take place nearer to the start of rehearsals, be sure that you understand what is expected of you and when you should perform these tasks. Not every academic theatre department has a faculty member specifically devoted to stage management training. If it is unclear where to go, start with the person who assigned you to the production. He or she should at least be able to get you started and point you toward other resources as needed.

A professional stage manager is traditionally hired much closer to the project's start date. An Equity stage manager will have a contractually defined prep week (the week before rehears-als begin) for analyzing the script and preparing initial paperwork. But if you are a member of a resident team for a theatre, you may be hired for a slate of shows in a season and may similarly be asked questions or given information before it is "time." It will be up to your discretion and availability if you choose to get involved prior to your official start date.

No matter when your assignment is determined, this first set of

information-collecting tasks is among your most important.

New, but Not a Novice

If you are a young stage manager, it is particularly important that you balance how much you ask versus how much you learn. There are certain questions only a director can answer: how he or she likes to organize rehearsals, preferences about visitors or breaks, deadlines for memorizing lines, and so forth. (An outline for a first conversation with the director can be found later in this chapter.) But the director may not be the best person to ask everything. Present yourself as someone capable of finding answers, not just asking questions. If you cannot locate the restrooms in the building, for example, or are uncertain of the procedures for locking up the rehearsal space, look for other information sources. This might be a fellow stage manager, your advisor in an academic setting, or the production manager. Your theatre or department might also have a handbook in which such details are already documented.

Given Circumstances

If you have worked at this theatre or with these team members before, you will have some basic information about logistics and the working styles of the participants. If not, you will need to begin your investigation of the project with those basics before diving into the script itself. The production manager is typically the best place to start. He or she coordinates the artistic and production details for all of the shows in a theatre's season and will have many answers for you. In an academic setting, you should again start with your faculty advisor.

Personnel

Question: Who is the director? Have you worked with this person before? Has the theatre?

Question: Who are the designers? Have you worked with any of these people before? Have they worked together? For this theatre? With this director?

If you are new to this company or department, it will be helpful to be aware of existing relationships. If your director is familiar with the company's procedures, you will be able to focus on communicating reminders of deadlines rather than explaining why they exist. If he or she has worked in the theatre before, blocking in a rehearsal room

can be developed with a better understanding of available backstage space. Designers who are resident to the theatre or are frequent guests will also have expectations about what is possible, what exists in stock, or other considerations.

But in addition to preexisting knowledge about the logistics, prior working relationships will affect how the players communicate with one another and, therefore, how you can best facilitate this dialogue. Team members with many successful shows together may have developed shortcuts in their pattern of information exchange—nicknames for people or units, and discussions filled with references to past shows. If you are the newcomer, it will be important to do some homework so that you can better understand this vernacular. This might mean looking at photos or paperwork of these past productions, getting background from a third party, or at times asking specifically for clarification. You won't want to assume you know what someone means and then transmit this information to someone else, only to find you've misunderstood a reference. Conversely, team members may feel they worked together so well in the past that they know what one another is thinking and do not need to convey details or ask as many questions. The stage manager needs to remain the conduit for consistent, clear information, despite this familiarity, to help avoid problems later on.

These prior relationships, however, may not necessarily have been positive ones. Negative past experiences, if allowed to fester, can easily taint this new production. Without engaging in gossip, see what you can learn. A designer who missed many of the deadlines set by the theatre in the past may have been given earlier due dates for drawings or paperwork this time around to build in a buffer. And while this might seem unimportant to you, if meeting those deadlines requires seeing a run-through of the show prior to a certain date, for example, it will be helpful to know this at the beginning so the rehearsal schedule can accommodate this need. If your director was unhappy with the execution of a design element in the past, he or she may make comments during rehearsal and ask that these dictates be included in a rehearsal report in a very specific way. As the stage manager, you will need to focus on separating information from the tone in which you received it.

Location

Question: Where will the show perform? Where will it rehearse? If these are two different locations, will there be rehearsals on the set prior to tech?

If you are unfamiliar with your rehearsal space or the theatre itself, go see them! If the rehearsal space is smaller than the theatre, you may have to make some compromises when marking the groundplan of the set in tape on the rehearsal room floor. You will want to ask the director about this before you begin, so that you don't find yourself

retaping the set at the end of the first rehearsal. It will also be important to know if the SM team can leave tables and furniture set up overnight, if there is a sound system in place for rehearsal cues, if there is a green-room space for actors, and other such details.

Groundplan: A bird's-eye view of the set and theatre architecture, drawn in scale by the scenic designer.

Taping the set: Replicating the groundplan on the floor of your rehearsal room by measuring the scale drawing and using tape to indicate where walls, platforms, and other scenic units are located. (The process of taping a set is discussed in Chapter 5.)

Once you have some basics under your belt, turn your focus to the show itself. This will have two parts—dates and details related to the production, and information contained in the script.

The Calendar

The production's calendar is an important source of information. In some instances you may be handed a calendar and tasked with seeing that deadlines are met. In other instances you may be collecting information from multiple sources and creating a calendar yourself.

Our earlier definition of the stage manager as seen in the task list created by Actors' Equity Association identifies three separate parts of the job related to this one item: calling rehearsals, facilitating outside activities, and maintaining records. From the perspective of the actors, the stage manager needs to create a document that clearly and succinctly identifies the overall rehearsal and performance dates, when individual members of the cast will be needed during the rehearsal process, how outside activities such as costume fittings and publicity events fit into the mix, and where important milestones such as running the show or line-memorization deadlines will fall.

These details are all essential to the actors, then, yet bear minimal overlap with the needs of the other users who will depend on the calendar. Designers and other members of the production team will be concerned with overall rehearsal and performance dates, but only occasionally with information about actor milestones. A specific charting of the acting work is of little use to them. This second group does have their own distinct needs as well, which include design deadlines, the load-in dates, and any unavailable time in the theatre due to outside events or maintenance issues—which are of no specific concern to the actors.

And actors and production team members are not the only interested parties. The crew members who will join the production to execute the technical elements care nothing about the events that precede their employment, nor do they care what happens in the building when they are not there. The business office is typically more concerned with overall hours and weeks worked in order to process payroll than with the content of that work time. A director will be interested in seeing that all the actor specifics they generated have been correctly outlined. He or she will want to know when to expect work from the designers and will likely need an additional set of publicity deadlines, which may require the director's time and attention but not affect any of these other players.

Our simple calendar has now become an extremely complex item, and the stage manager faces the challenge of collecting and presenting this information in the most useful way to all of these groups.

So where do you begin?

The theatre is likely to have an overall production calendar that shows how multiple productions fit together into a single season. Unless you hold a supervisory position in your stage management department, you may play no role in creating this calendar. But you will most certainly want a copy.

The Production Calendar Versus The Actor Calendar

Take a look at the page from a season calendar presented in Figure 3.1. It contains production information for two overlapping shows in two different theatres. As the stage manager for *Twelfth Night*, you are most concerned with the details for that show. But if you share personnel with the production of *Galoshes* running at the beginning of the month, you can identify this as a time when those designers and technicians will have a decidedly split focus—and your show is probably not the priority. You do not need to do anything with this information now, but will want to remember it as that time approaches. (Note: *Galoshes* refers to a children's production of *Galoshes of Fortune* performed in the theatre's other performance space.)

The calendar outlines for you many important production details in your direct purview: deadlines for adding props and sound cues, crew meetings, and pre-scheduled runs of the show. If everyone on your production team has this general calendar, you may not need to recreate one for them. But make note of these details so that you can help your team meet these deadlines.

Even if you could get access to the original file and delete the items not specific to your show, this would not be a good version of the calendar to distribute to

your cast, however. It does not contain specifics about rehearsal. And simply replacing the *Galoshes* details with your rehearsal schedule will not create a usable document. You would end up with a calendar so overloaded with information that it would be difficult to navigate. It may be possible to make your font size small enough to fit everything, but at what cost? If the calendar is too difficult to read, many won't invest time to do so. Instead, take the relevant details from this production calendar and create a version better suited for the actors.

Now evaluate actor calendar in Figure 3.2. You will notice several difference right from the start. First, this calendar has been set up to include the entire rehearsal and performance period on a single page, from mid-October to mid-December. Second, each rehearsal has a specific time. Items such as the Senior Shows, seemingly unrelated to *Twelfth Nigh*t on the production calendar, do in fact impact rehearsal times. You will be scheduling around them. So they are worth including. The run for lights on November 15 is an important landmark for the actors, so it is transferred, as are notations of holidays and daylight-savings time. But you also want to include dates not appropriate for the general production calendar such as the off-book deadlines on November 16 and 18, which you learned from the director.

This is an ideal amount of information to provide actors at the beginning of the process, starting at auditions. Obviously, it does not have enough specifics to guide the work for individual nights of rehearsal. It is not attempting to do so. Once rehearsals begin, the stage manager will create subsequent weekly or daily rehearsal calls to communicate those specifics. Even if you have them at this point, they are not necessary inclusions.

Formatting The Calendar

It may seem obvious, but the most important formatting consideration for a calendar is that it looks like a calendar! This means clearly identified months, weeks, and days. Whether you are creating a single page for each month or a multi-month calendar for your entire production process, both calendars make this information available and clear. To help denote that our sample actor calendar contains multiple months, simple shading has been used.

A typical Equity workweek is six days, traditionally Tuesday through Sunday, with Monday as the day off. It may be tempting to move the Monday column to the far left, so that each row of the calendar is a single work week for your show. But what happens when an actor takes your calendar and compares it to a work calendar or even a personal calendar? Ultimately this will create more confusion than you intend.

NOVEMBER

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 12:05 Dept Mtg Galoshes Sound Load In Galoshes Hang	2	3 12:05 Twelfth Night Prod Mtg Galoshes Focus	4 Galoshes Focus	5 12:05 Galoshes Paper Tech 6pm Senior Show Galoshes Focus	6 Galoshes Cueing
7 Galoshes SM Load In Galoshes Cueing *Daylight Savings Clocks 1 hour back*	8 Frederick Theatre- Limited or No Class Availability 12:05 Dept Mtg Galoshes Tech	9 Galoshes Dress	10 9:00, 11:00, 1:00 Galoshes 12:05 Twelfth Night Prod Mtg Twelfth Night Prelim Light Plot	11 9:00, 11:00, 1:00 Galoshes *Veterans Day*	12 9:00, 11:00, 1:00 Galoshes Photocall	13 11:00, 1:00 Galoshes Strike
14	15 12:05 Dept Mtg Twelfth Night Hang 5:00 Twelfth Night Crew Meeting Twelfth Night Run for LX	16 Twelfth Night Hang	17 12:05 Twelfth Night Prod Mtg Twelfth Night Final Light Plot Prop & Sound Add Deadline	18 Twelfth Night Early Reservations	19 6pm Senior Show	20
21	22 12:05 Dept Mtg Twelfth Night Focus	23 Twelfth Night Focus	24 Twelfth Night Paper Tech Twelfth Night Focus	25 Thanksgiving Break	26	27 Twelfth Night Cueing
28 Twelfth Night SM Load In Twelfth Night Cueing	29 12:05 Dept Mtg Twelfth Night Box Office Opens Twelfth Night Tech	30 Twelfth Night Tech				

Figure 3.1 A month from the UWL Theatre's production calendar

Twelfth Night

PRELIMINARY REHEARSAL CALENDAR

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
October 24	25 Rehearsal 6:30 9:30 pm	26 Rehearsal 6:30 9:30 pm	27 Workshop 6:30 8:30 pm (cast required to attend — open to all majors/minors)	28 Rehearsal 6:30 9:30 pm	29 **6:00 pm Allyssa Senior Show** Rehearsal 7 10 pm	30
31	November 1 Rehearsal 6:30 9:30 pm	2 Rehearsal 6:30 9:30 pm	3 Rehearsal 6:30 9:30 pm	4 Rehearsal 6:30 9:30 pm	5 Rehearsal 6:30 9:30 pm	6
7 *Daylight Savings* *Clocks 1 hour back!*	8 Rehearsal 6:30 9:30 pm	9 Rehearsal 6:30 9:30 pm	10 Rehearsal 6:30 9:30 pm	11 Rehearsal 6:30 9:30 pm	12 Rehearsal 6:30 9:30 pm	13
14	15 Rehearsal 6:30 9:30 pm Run through for Lights	16 Rehearsal 6:30 9:30 pm OFF BOOK PART ONE	17 Rehearsal 6:30 9:30 pm	18 Rehearsal 6:30 9:30 pm OFF BOOK PART TWO	19 **6:00 pm Tim & Donnie Senior Shows** Rehearsal 7:30 10 pm	20
21	15 Rehearsal 6:30 9:30 pm	15 Rehearsal 6:30 9:30 pm	24 Thanksgiving Break	25	26	27
28	29 **6–10 pm** **TECH REHEARSAL**	30 **6–10 pm** **TECH REHEARSAL**	December 1 **6–10 pm** **TECH REHEARSAL**	2 **10:00 am MATINEE** **Photo Call**	3 **7:30 pm Performance**	4 **Afternoon Put-in Rehearsal** **7:30 pm Performance (Understudies)**
5 **2:00 pm Matinee**	6	7	8	9 **7:30 pm Performance**	10 **7:30 pm Performance**	11 **7:30 pm Performance**
12 **2:00 pm Matinee Strike**						

As of 10/22/10

Specific Rehearsal Times are Subject to Change
Afternoon Calls for Costume Fittings, etc to be arranged

Figure 3.2 The rehearsal calendar for *Twelfth Night*

Visually the two will not line up, and the difference between an activity happening on a Tuesday versus a Wednesday could be quite problematic if misread.

Another visual aid is at play in the actor calendar, particularly during the performance weeks. Activities occur during two major blocks of time—during the day and at night. Evening performances are lined up lower in the cells than matinee performances, with the morning high school matinee placed above them all. Deadlines are listed above call times to keep them separate, also distinguished by one of the few uses of all capital letters. Italics are also used for other things of note that are important but not about the production.

The stage manager will find that this calendar is one of the most frequently needed items. You will print or copy it often. And because of this, color is often a poor formatting choice. At the University of Wisconsin–La Crosse, the production calendar is primarily distributed by email and is uploaded to two different theatre websites. It is printed and officially posted in only two locations. The calendar contains information for seven different productions, as well as department events and holidays. The volume of information, and the fact that it is not routinely sent through a copier, makes the use of color appropriate to help differentiate the categories. Were this document primarily duplicated and distributed in hard copy, the color distinctions would be less effective. The department would either make different choices to separate individual categories of information or reluctantly accept that the printed version will always be less accessible than the electronic copy. In contrast, the actor calendar—almost exclusively shared in printed form—utilizes font style for emphasis. This is appropriate based on its distribution method.

Some Thoughts About Calendar Programs

In today's age of technology, a wide variety of computer programs exist for creating and maintaining calendars. We can synchronize them across multiple computers or even with our phones, set up a series of reminders, and input recurring events by typing them once and clicking a series of boxes. But while these are all useful tools, it does not mean that calendar software is best for theatre productions.

The stage manager's primary concern is not how the calendar functions within a computer, but how well it works in its printed-out form. If the computer program does not let you control the order in which events are listed on a day or doesn't like text-only details without a specific time, you might find that you are changing what you want to include in order to make it conform to what the calendar program thinks you need. Or what if the program limits how many events can be seen on a single day?

When the stage manager is looking at a calendar on a computer and sees "plus 4 more" while in month view, it is easy enough to click that link and have the calendar transform itself to a week or day view to access those additional details. But in print, that link is useless and the additional information is lost.

I have personally tried and evaluated many different calendar programs over the course of my career, and despite many promises of ease, I find that control over both format and content is best found not in a calendar program at all. I create my calendars in either Microsoft Word or Microsoft Excel, making use of templates I set up that can be tweaked and customized to fit the needs of any production. Sample templates appear on this book's companion website, allowing you to spend time looking at how they are set up.

Analyzing the Production

After mining the calendar for details relevant to your show, the stage manager's next set of tasks during this pre-production time is related to the script itself. Before you can begin to understand what will make this particular production of the show unique, it is important to understand the basics presented on the page.

The stage manager should begin each project by simply reading the script. As difficult as it can be to turn off the part of the brain accustomed to seeking out details, start by absorbing the story and getting an overall sense of the show. With these general observations in hand, return to the script and now look for the specifics provided in the dialogue and stage directions, taking careful notes as you go.

It is essential for the stage manager to understand what the script dictates in order to accurately assess information about your production of it. It is helpful to have a consistent method for taking notes and a common format for recording your discoveries, but this is a tool not necessarily intended for distribution.

The chart in Figure 3.3 provides one method for capturing this information. In this setup, the stage manager can enter each fact as a separate row, noting it in the column or columns most appropriate. It is important to remember that you are simply cataloging your discoveries, not making decisions about them. Consider the following invented dialogue:

Mary: Gosh it's cold in here.

John: You can borrow that sweater if you want.

Mary: Thanks! I feel much better now.

From this dialogue we can infer that there is a sweater belonging to John somewhere

on the stage and that Mary puts it on. The stage manager records this information. But all you know is that there is a sweater—not its color, fabrication, or style. Noting that John has a blue cardigan on your chart would be filling in details not provided by the script.

In other instances, it may not be clear to whom a certain detail belongs. When working on a production of Chekhov's *The Seagull*, the stage manager will discover a stage direction in Act Two that details Treplev's entrance "carrying a gun and a dead seagull." The gun itself can be entered on the chart as a prop in the show. A subsequent stage direction in Act Four tells the stage manager that the "sound of a shot offstage" is heard. This effect should also be noted. But does this sound come from the gun you noted in Act Two, a starter pistol fired in the wings, or a recorded sound effect played through a location-specific speaker? Because the stage manager may not know which method will be used, it is best to record the gunshot as both a possible sound effect and a possible functional weapon for now, because two separate production areas would be responsible for executing this effect.

The Tempest

Production Analysis

Act/Scene	Page	Character/Costume	Set/Dressing	Lights	Props	Sound	Other/Questions
2.1	38				*Antonio* and *Sebastian* take out their swords	*Ariel* sings another song to the men	
2.2	39				Pile of wood that *Caliban* carries in	A noise of thunder heard	
	40	*Trinculo* enters and covers himself with his cloak	Stated that there are no bushes or shrubs on the island			Wind whistling; another noise of thunder is heard	*Trinculo* states he can see a huge black cloud
	41	*Trinculo* crawls under *Caliban's* garment; *Stephano* enters			*Stephano's* wine bottle		
3.1	46		A possible pile of logs that *Ferdinand* has stacked up already?		*Ferdinand* carries a log		
3.2	52	*Stephano* strikes *Trinculo*					
	54					*Ariel* plays a tune on a drum and a pipe	
3.3	56	*Several strange Shapes* enter and dance silently	A banquet appears			Solemn and stage music	*Prospero* invisible How will the banquet appear?
	58	*Ariel* is stated having wings	The banquet disappears	Lightning	Swords are drawn by all onstage in fear of *Ariel*	Thunder and lightning	How will the banquet disappear?
	59	*Strange Shapes* appear again and dance				Thunder for exit	*Ariel* vanishes
4.1	62					Soft music plays	
	63	*Iris* enters; *Juno* enters; *Ceres* enters	*Juno's* chariot appears from above and descends				*Juno* enters from above? Will *Ceres* be played by *Ariel*
	64					*Juno* and *Ceres* sing	
	66	*Nymphs* enter; *Reapers* enter				*Nymphs* and *Reapers* share a dance	Music to the dance? How many *Reapers* and *Nymphs*?

Figure 3.3 An excerpt of a Production Analysis for *The Tempest* created by stage manager Quinn Masterson

This completed analysis serves as an excellent reference tool for the stage manager's early meetings with the production team. In an academic setting the stage manager may be in attendance for design discussions, while in a professional setting he or she may join the process much later on. Regardless of the scenario, the stage manager can refer to these notes during meetings. If the gun is discussed, for example, with no mention of how the shot will be handled, the stage manager has created a reminder to ask if a decision has been made about the cue. And while this may be an obvious question to ask on a production of this particular play, the stage manager should not expect to memorize every detail of every element in the show. Using the notes helps ensure that details are not forgotten—or not forgotten to be shared with you.

Once your analysis is supplemented with answers either from formal meetings or informal conversations with the director or designers, you will be ready to create paperwork for your full production team based on this chart. It is unlikely that you will be asked to make a preliminary light cue list based on the information the script contains, but the stage manager is very involved in the creation and maintenance of the prop list, and, in some theatres, may create the initial version of the sound cue sheet. The stage manager's specific responsibility for such paperwork will differ from theatre to theatre, so be sure that you are clear on what is expected of you.

The Character/Scene Breakdown

Your next important task will be the character/scene breakdown. This document is a page-by-page detailing of who is onstage. The stage manager collects this information by thoroughly examining the script, and then meeting with the director to get further clarification about ensemble characters who may not have many specific page references.

Key Users

Director and stage management team

Cast

Costume designer

Sound designer/engineer on a musical

Twelfth Night

Character/Scene Breakdown

		I-1 Orsino's Palace first day, early morning			I-2 Illyrian Coast simultaneous with I-1			I-3 Inside Olivia's House simultaneous with I-1 and I-2					I-4 Orsino's Palace early morning 3 days after Orsino & Cesario meet		
		3	4	5	5	6	7	8	9	10	11	12	12	13	14
Justin Cooke	Orsino	+X	X	X-									+X	X	X-
Matthew Matuseski	Sebastian														
Kevin Fanshaw	Antonio														
Jacob Gustine	Sir Toby Belch							+X	X	X	X	X-			
Tim McCarren	Sir Andrew Aguecheek								+X	X	X	X-			
Andrew Kelly	Malvolio														
Donnie Mezera	Fabian														
Alden Hedges	Feste														
Allyssa Dunn	Olivia														
Claire Ganshert	Viola				+X	X	X-						+X	X	X-
Amy Nelson	Maria							+X	X	X	X	X-			
Jacob Voss	Sea Captain, Priest				+SC	SC	SC-								
Austin Hernandez	Valentine Sailor 3, Officer 1		+V	V-		+S	S-						+V	V	V-
Luke Prescott	Curio, Sailor 1, Officer 2	+C	C	C-		+S	S-						+C	C	C-
Brian Coffin	Lord 1, Sailor 2, Officer 3	+L	L-		+S	S	S-						+L	L	L-
Don Hart	Lord 2, Officer 4	+L	L	L-									+L	L	L-
Emily Ware	Olivia Attendant 1														
Lindsay Van Norman	Olivia Attendant 2														
Suzanne Clum	Musician 1	+X	X-												
Shelby Krarup	Musician 2	+X	X-												

X Onstage, +X Enter, X- Exit, +X- Enter/ Exit, (X) Onstage "hiding"
Other initials indicate ensemble character

Version 1: 10/21/10

Page 1 of 5

Figure 3.4 The character/scene breakdown for *Twelfth Night*

What it contains

The actors in the show and the roles they play

The scenes in the play broken down by page

Scene nicknames or descriptions developed by the director or SM

Songs and references to score pages (for a musical)

Why do it?

To develop a more specific rehearsal schedule

To identify who may have fast costume changes

To identify who might be available to help with scene changes

To discover any incidental characters not yet cast

Content Considerations

Much like the full production calendar, the character/scene breakdown is a detail document. It is intended to present a comprehensive look at when the actors will appear on stage. Your key challenge as a stage manager is to make the breakdown easy to navigate, since you will intentionally include a great deal of information.

The breakdown is best organized as a chart. The use of defined rows and columns will enable you to be consistent in how you enter the specifics. This is not a case where you are striving for someone to quickly glance at the paperwork and learn what they need to know—here you are trying to consolidate many facts in a single location.

Listing Your Cast

If you are stage managing a play or musical in which each actor plays only a single role for the entire production, you could limit your name listing to a single column of only the character names. If, however, some or all of your actors play multiple roles, you will need to list both actor names and character names. One of the goals of this document is to help identify when costume changes will occur, and if characters are not consolidated by actor, you will miss out on this.

Take a look at the two-column name listing in the *Twelfth Night* breakdown in Figure 3.4. It is organized with principal actors at the top and ensemble members

below. Although only half the cast plays multiple roles, the breakdown is set up based on the most complex casting, not the least.

Scenes versus Pages

It would, of course, save you both time and paper to include only columns for the individual scenes rather than a page-by-page listing. But as was true for listing only character names, this would require you to omit some information.

Observe the detail provided in the *Twelfth Night* breakdown for the five male ensemble cast members excerpted in Figure 3.5. All five appear in Scene One, Scene Two, or both. A breakdown organized by scene would provide the bare minimum of information. The stage manager might guess that fast costume changes might be required but would not know exactly when.

The page-by-page listing shows us that Austin and Luke are on stage at the end of Scene One, entering late into Scene Two after a potential costume change. In contrast, Brian exits early from the first scene and appears at the top of Scene Two. We can now tell that costume changes, if planned, will be staggered but are essentially simultaneous—as well as very fast (a single page each). The stage management team can see it will need to spend time asking questions about this part of the show early in the rehearsal process and work with the costume shop to prepare the actors and backstage areas.

In this production, the actors helped to transform the stage by moving scenic pieces on and off the stage. The breakdown also facilitates identifying the most logical actor to help strike scenery (Don) or bring on new pieces (Jacob). Although both actors play multiple roles, neither will be involved in a costume change during this shift. And while it is not your job to dictate these decisions to the production team, you need to be prepared to answer questions about available actors when the director or scenic designer asks.

The stage manager virtually never has input into the crew hired for a show, but is sometimes asked about the production's needs while that crew is assembled by the technical director or production manager. If we continue to follow the rows across the page, we can see that three of the ensemble men will need to change back before reappearing on stage in Scene Four. But unlike the first change, they now have an entire scene five pages long to do so. The costume crew will need to efficiently reset the costumes after the fast change, but may not need to provide assistance this time—freeing them for other duties that may be required and impacting the potential number of technicians.

Page Numbers

If you look carefully at the row including the script page numbers, you will notice that numbers occasionally repeat. It is rare to find a script where the scene break never falls in the middle of a page. By repeating the page numbers that have scene splits on them, you are prepping yourself for easier formatting. More about that later.

Identifying Scenes and Locations

The case has been made for listing out all page numbers. However, this does not mean that individual scenes should not also be detailed. We still need to know where we are in the play! Insert a row to contain scene names and numbers immediately above the page listing.

In this production, time was of great importance to the director; this sample breakdown goes a step further. A significant portion of the first design meeting was devoted to discussions about when the individual scenes occur. Although these notes were included in the meeting minutes, the stage manager repeated this information into the breakdown so that the designers could look in a single place and know when and where we are, along with who is on stage.

		I-1 Orsino's Palace first day, early morning			I-2 Illyrian Coast simultaneous with I-1			I-3 Inside Olivia's House simultaneous with I-1 and I-2					I-4 Orsino's Palace early morning 3 days after Orsino & Cesario meet		
		3	4	5	5	6	7	8	9	10	11	12	12	13	14
Jacob Voss	Sea Captain, Priest				+SC	SC	SC-								
Austin Hernandez	Valentine Sailor 3, Officer 1		+V	V-		+S	S-						+V	V	V-
Luke Prescott	Curio, Sailor 1, Officer 2	+C	C	C-		+S	S-						+C	C	C-
Brian Coffin	Lord 1, Sailor 2, Officer 3	+L	L-		+S	S	S-						+L	L	L-
Don Hart	Lord 2, Officer 4	+L	L	L-									+L	L	L-

Figure 3.5 A close-up of the male ensemble actors

Key

Organizing the breakdown by page means that the stage manager can detail not only who is in a scene but also when they enter and exit, if they appear on stage but do not speak, if they sing from the wings, and other specific details. The character/scene breakdown can be thought of as a map of the script and, as such, needs a key (Figure 3.6). This ensures that everyone reading the document can understand it.

A simple X will suffice for making entries for principal characters playing a

single role—we need to know only if the character is present. Our multi-role ensemble members need a bit more detail. The simplest way to achieve this is to replace the X with a role-specific letter abbreviation (one that should coordinate with your blocking key).

X Onstage, +X Enter, X- Exit, +X- Enter/ Exit, (X) Onstage "hiding"
Other initials indicate ensemble character

Figure 3.6 The breakdown key

Why note something like "hiding"? To ensure that no one is omitted from a rehearsal call. When flipping quickly through the script, it might be possible to forget that someone is onstage if the character has not spoken for several pages. That character may, however, still have an important function in the scene. By noting the actor is present but silent, the stage manager is prepared to ask the director if the actor should be called for a particular rehearsal. The focus of that day—blocking versus text work, for example—may prompt different answers from the director.

As you gain experience, you will develop a method to transition with you from show to show, but be ready to address each production's new requirements, and be willing to add or adapt your previous documentation.

Formatting the Breakdown

As mentioned earlier, this breakdown is best formatted as a chart. Depending on the stage manager's software savvy, it can be done in either a spreadsheet or word-processing table. Both provide the separation into rows and columns necessary to navigate the details.

This chart is laid out in landscape format, providing the stage manager sufficient room for the scene details, the two-column cast listing, and a reasonable number of script pages to be laid out horizontally. There is also room for the key, page numbers, and version information while still maintaining enough white space so the document is not overwhelming.

Look at the difference were the document to be set up in portrait format as seen in Figure 3.7. By the time the chart heading information is repeated, the page has

become crowded and more difficult to read. It might be possible to squeeze a few more individual pages of the script onto this page of the chart, but the stage manager does so at the expense of accessibility.

To make enough room for the necessary number of rows, their height has been decreased, crowding the text. In order to maintain minimal margins on right and left, Scene Five no longer fits on a single page. This would mean either repeating the scene heading information on the next page or paginating the document such that all of Scene Five falls on page two, leaving a large empty space at the bottom of page one.

In the case of a show with a small cast, the repetition necessary to have multiple-row sets on a single page may not be problematic. But for shows with cast sizes similar to or larger than our sample, there is little benefit to the choice. Remember what we saw with our calendar—if the information is not accessible, it is like you haven't provided it at all.

Guiding the Eye

Whenever you are creating a document intentionally filled with detail, it is essential to help the reader navigate it. An unshaded chart is devoid of focus, and people receiving this breakdown will have to work to find the information they are looking for. Simply by introducing shading, you help focus the reader's eye.

This breakdown uses vertical shading to help distinguish individual scenes. The reader can easily find the relevant scene and then locate the actor in question. You can now see why we repeated the page numbers. Because the duplicates fall into different shading zones, it is not distracting. But we have avoided having to do one more formatting step by splitting those cells and trying to line up the outside margins.

Consider the alternative offered by the chart in Figure 3.8. In this case, the shading separates individual actors. And while it may be simpler to follow the rows across the page, it is more difficult to find where scenes begin and end. And overall, the "striped" version is busier. We haven't helped the reader's eye—we have added a layer of distraction.

The scene distinction is further reinforced by merging cells at the top of the page. Notice that the cells above pages three through five are merged into one. This instantly identifies them as a single scene, and, as a bonus, gives you a bit of extra room for your text.

Twelfth Night

Character/Scene Breakdown

		I-1 Orsino's Palace first day, early morning			I-2 Illyrian Coast simultaneous with I-1			I-3 Inside Olivia's House simultaneous with I-1 and I-2				
		3	4	5	5	6	7	8	9	10	11	12
Justin Cooke	Orsino	+X	X	X-								
Matthew Matuseski	Sebastian											
Kevin Fanshaw	Antonio											
Jacob Gustine	Sir Toby Belch							+X	X	X	X	X-
Tim McCarren	Sir Andrew Aguecheek								+X	X	X	X-
Andrew Kelly	Malvolio											
Donnie Mezera	Fabian											
Alden Hedges	Feste											
Allyssa Dunn	Olivia											
Claire Ganshert	Viola				+X	X	X-					
Amy Nelson	Maria							+X	X	X	X	X-
Jacob Voss	Sea Captain, Priest				+SC	SC	SC-					
Austin Hernandez	Valentine Sailor 3, Officer 1		+V	V-		+S	S-					
Luke Prescott	Curio, Sailor 1, Officer 2	+C	C	C-		+S	S-					
Brian Coffin	Lord 1, Sailor 2, Officer 3	+L	L-		+S	S	S-					
Don Hart	Lord 2, Officer 4	+L	L	L-								
Emily Ware	Olivia Attendant 1											
Lindsay Van Norman	Olivia Attendant 2											
Suzanne Clum	Musician 1	+X	X-									
Shelby Krarup	Musician 2	+X	X-									

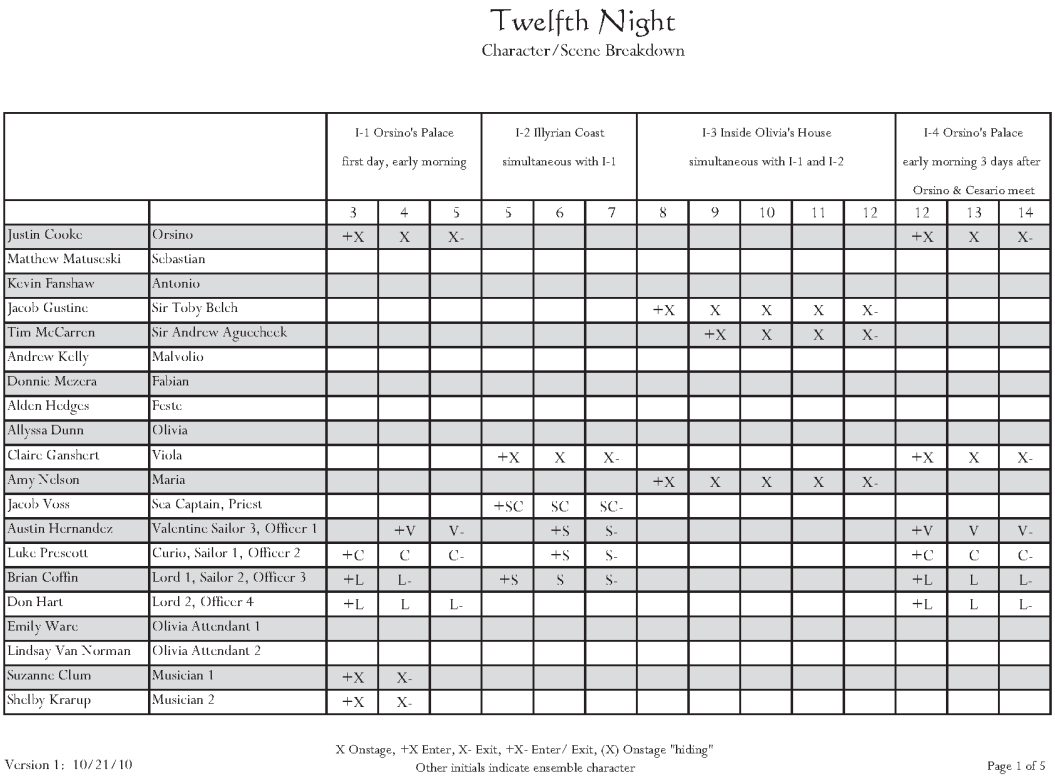
		I-4 Orsino's Palace early morning 3 days after Orsino & Cesario meet			I-5 Inside Olivia's House one hour after I-4 *(scene continues on next page)*							
		12	13	14	14	15	16	17	18	19	20	21
Justin Cooke	Orsino	+X	X	X-								
Matthew Matuseski	Sebastian											
Kevin Fanshaw	Antonio											
Jacob Gustine	Sir Toby Belch								+X-			
Tim McCarren	Sir Andrew Aguecheek											
Andrew Kelly	Malvolio					+X	X	X-	+X	X-		
Donnie Mezera	Fabian											
Alden Hedges	Feste				+X	X-	X	X-	X-			
Allyssa Dunn	Olivia					+X	X	X	X	X	X	X
Claire Ganshert	Viola	+X	X	X-						+X	X	X
Amy Nelson	Maria				+X	X-		+X-		+X	X	X-
Jacob Voss	Sea Captain, Priest											
Austin Hernandez	Valentine Sailor 3, Officer 1	+V	V	V-								
Luke Prescott	Curio, Sailor 1, Officer 2	+C	C	C-								
Brian Coffin	Lord 1, Sailor 2, Officer 3	+L	L	L-								
Don Hart	Lord 2, Officer 4	+L	L	L-								
Emily Ware	Olivia Attendant 1					+X	X	X	X	X	X	X-
Lindsay Van Norman	Olivia Attendant 2					+X	X	X	X	X	X	X-
Suzanne Clum	Musician 1											
Shelby Krarup	Musician 2											

X Onstage, +X Enter, X- Exit, +X- Enter/ Exit, (X) Onstage "hiding"
Other initials indicate ensemble character

Figure 3.7 The breakdown set-up in portrait view

Shading versus Color

Ultimately the same visual help could be achieved by the subtle introduction of colored columns. As long as the color is not too dark to interfere with the text itself, it can be successful. Choosing between shading and color is determined by distribution format. For example, this breakdown will be distributed to all of the cast members, as well as the SM team, the director, and the costume shop—at this theatre just shy of thirty individuals.



Twelfth Night
Character/Scene Breakdown

		I-1 Orsino's Palace first day, early morning			I-2 Illyrian Coast simultaneous with I-1			I-3 Inside Olivia's House simultaneous with I-1 and I-2					I-4 Orsino's Palace early morning 3 days after Orsino & Cesario meet		
		3	4	5	5	6	7	8	9	10	11	12	12	13	14
Justin Cooke	Orsino	+X	X	X-									+X	X	X-
Matthew Matuseski	Sebastian														
Kevin Fanshaw	Antonio														
Jacob Gustine	Sir Toby Belch							+X	X	X	X	X-			
Tim McCarren	Sir Andrew Aguecheek								+X	X	X	X-			
Andrew Kelly	Malvolio														
Donnie Mezera	Fabian														
Alden Hodges	Feste														
Allyssa Dunn	Olivia														
Claire Ganshert	Viola				+X	X	X-						+X	X	X-
Amy Nelson	Maria							+X	X	X	X	X-			
Jacob Voss	Sea Captain, Priest				+SC	SC	SC-								
Austin Hernandez	Valentine Sailor 3, Officer 1		+V	V-		+S	S-						+V	V	V-
Luke Prescott	Curio, Sailor 1, Officer 2	+C	C	C-		+S	S-						+C	C	C-
Brian Coffin	Lord 1, Sailor 2, Officer 3	+L	L-		+S	S	S-						+L	L	L-
Don Hart	Lord 2, Officer 4	+L	L	L-									+L	L	L-
Emily Ware	Olivia Attendant 1														
Lindsay Van Norman	Olivia Attendant 2														
Suzanne Clum	Musician 1	+X	X-												
Shelby Krarup	Musician 2	+X	X-												

Version 1: 10/21/10

X Onstage, +X Enter, X- Exit, +X- Enter/ Exit, (X) Onstage "hiding"
Other initials indicate ensemble character

Page 1 of 5

Figure 3.8 The breakdown with horizontal shading

Remember the practicalities of document design first introduced in Chapter 2. Do you have a color Xerox machine? Does your theatre or department allow unlimited copies? If both answers are yes, then color might be a reasonable option. But if either answer is no, consider how you will produce all the copies. If you print one in color and then copy it in black and white, you've defeated the purpose of using color in the first place. And if the color is too light to copy, then you will end up with an unshaded document.

Does the SM team have a color printer? How much ink will you waste trying to print thirty copies of a seven-page chart? And what happens when changes are made and you need to distribute an updated version?

It is easy, as a new stage manager, to think that color is the answer—that it makes your paperwork look pretty and, therefore, more professional. But stylish does not always mean practical. Remember that one of the stage manager's goals is to work efficiently to communicate the information they have. Wasting time and money is not efficient.

That being said, you will notice the introduction of a color logo on the *Young Frankenstein* breakdown in Figure 3.9. For this production, most of the information was distributed electronically to the design team. This meant no major drain on color ink cartridges.

The logo was also tested on the copier and was adequately readable in grayscale. The breakdown could be distributed in hard copy to the actors. The color was also used only as an accent rather than as an essential navigational tool. It helped to provide continuity among all the pieces of production paperwork, but the loss of color in the logo, when printed in black and white, did not hamper the accessibility of the document.

What does this mean? Know the rules but also when it is okay to break them!

Extra Considerations for the Musical

When stage managing a musical, the stage manager will have two "scripts" to consider—the libretto and the score. No matter what form the script in your prompt book takes, it is essential that you are able to communicate with everyone. You will need to know both scenes and songs, and page numbers in both of these books.

The **prompt book** is the stage manager's binder, which contains copies of all paperwork for an individual production, along with the copy of the script in which you will record blocking and cues. Chapter 4 discusses the prompt book and prompt script in detail.

The *Young Frankenstein* character/scene breakdown shows you how to incorporate this additional information. It will affect both content and format. Because the actors and director work primarily from the libretto, those page numbers are located on the top. And because this musical has defined scenes, they are clearly delineated with the same cell merging and shading we saw in the play breakdown.

Music-specific information is found at the bottom of the chart. Just as we did for

YOUNG FRANKENSTEIN

Revised Character/Scene Breakdown

ACT ONE		1-Translyvania Heights				2-Medical School								3-Hudson River Pier						4-Train Station					
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
Justin Cooke	Frederick					+X	X	X	X	X	X	X	X-	+X	X	X	X	X	X-	+X	X	X	X	X	X-
Katie Katschke	Elizabeth													+X	X	X	X	X	X-						
Maxwell Ward	Igor																			+X	X	X	X	X	X-
Erica Bush	Inga																								
Lily Cornwell	Frau Blucher																								
David Holmes	Inspector Kemp		+X	X-																					
Alex Taylor	Monster																								
Connor O'Hara	Hermit																								
Quinn Masterson	Victor, Vil																								
Lewis Youngren	Ziggy, Pas, Horse, Ritz	+Z	Z	Z	Z-									+P	P	P	P	P	P-						
Anna Mae Beyer	Stu, Sci, Ent, Bush					+ST	ST	ST	ST	ST	ST-														
Callie Boydston	Stu, Sci, Ent, Bush					+ST	ST	ST	ST	ST	ST-														
Tanner Costello	UT, Vil	+UT	UT	UT	UT-																				
Jessie Fanshaw	Vil, Pas	+V	V	V	V-									+P	P	P	P	P	P-						
Mitchell Gray	Stu, Pas, Sci, Ent					+ST	ST	ST	ST	ST	ST-			+P	P	P	P	P	P-						
Corey Holloway	Stu, Pas, Sci, Ritz, Exec					+ST	ST	ST	ST	ST	ST-			+P	P	P	P	P	P-						
Rebecca Johnson	Vil, Pas, Ritz	+V	V	V	V-									+P	P	P	P	P	P-						
Brandon Madrzak	Stu, Pas, Sci, Vil					+ST	ST	ST	ST	ST	ST-			+P	P	P	P	P	P-						
Aamer Mian	UT, Tel Boy, Vil, horse	+UT	UT	UT	UT-							+TB	TB-												
Maddie Napolski	Vil	+V	V	V	V-																				
Jandrea Novak	Vil, Pas, Ritz	+V	V	V	V-									+P	P	P	P	P	P-						
Casey Schneider	Vil, Pas, Ritz	+V	V	V	V-									+P	P	P	P	P	P-						
Seth Von Steidl	Herald, Stu, Steward/ Purser, Shoe, Werewolf, Sci, Ent, Drac, Vil, Ush	+H	H	H-		+ST	ST	ST	ST	ST	ST-			+SP	SP	SP	SP	SP	SP-	+SH-					
Derek Sveen	Mr. Hilltop						+X	X	X-																
Crystalia Varelis	Vil	+V	V	V	V-																				
Katy Williams	Vil, Ent, Ritz	+V	V	V	V-																				
Bryce Wilson	Vil	+V	V	V	V-																				
		#2 Happiest Town in Town				#3 (There is Nothing Like) The Brain										#4 Please Don't Touch Me						#5 Together Again			#5a
	score pages	*4-15*				*16-34*										*38-50*						*54-63*			*64-65*

Key: x Onstage, +x Enter, x- Exit, +x- Enter/ Exit, (x) Speaks from offstage;Vil= villager, Stu= student, Pas=passenger, Sci=scientist, UT=undertaker, Ent= Elizabeth's entourage, Ritz= Ritz tapper, Exec=executioner; SPECIFIC ENSEMBLE ASSIGNMENTS SUBJECT TO CHANGE OR ADDITION

Figure 3.9 The character/scene breakdown for *Young Frankenstein*—a musical with designated scenes

scene details, cells are merged to help distinguish individual songs, identified both by song number and title. Score pages are included, and, by placing them below the song titles, they are easy to read and not lost in the chart.

Notice what happens when a song is short. A single cell is far too small to say "#5a Together Again Encore." Rather than repeating the libretto page numbers or increasing the width of the column solely for the sake of making room for the full title, the stage manager has opted to include only the song number. It is short enough to fit, and logical because the composer's numbering automatically implies a relationship to the previous song.

Multitasking Tip

The SM can use the character/scene breakdown to make rehearsals more efficient for all. The chart makes it clear that several actors will not be needed when the early pages of the script are rehearsed, and also points out actors with smaller blocks of time.

If you are spending a rehearsal day on the first three scenes of Act One, then a request from the costume shop to see the actors playing Igor or the Monster would be easily accommodated. But what about a request for Aamer Mian? The breakdown makes it clear that he is offstage for several pages. It also notes that most of those pages are a song. If you will be choreographing the song on that day, then it would be reasonable to schedule him for a fitting as well—learning choreography is a complex process that takes more time than blocking. But if you are simply reviewing the scenes, then that six pages will pass by much more quickly, and he probably does not have time to go anywhere other than the green room until you reach Scene Three.

Not all musicals have the traditional book format. Consider a musical like *Rent* with no formal scenes within the acts. In this case, the script divisions—and likely the rehearsal schedule—will be based on songs. The *Rent* example in Figure 3.10 shows the songs now in a place of prominence at the top of the chart.

Because there is only one row devoted to text-based subdivisions of the play, the page numbers in libretto and score have also been placed closer together. Separating them at the top and bottom of the page isn't necessary in this instance. But there are formatting tricks still at work. The score page line is in italics, giving it visual distinction from the libretto page line. And further clarity comes from centering the page numbers so that they are not directly in line with the row below.

RENT

Revised Character /Scene Breakdown

Act One		1 - Tune Up A		1a - Voice Mail #1		2 - Tune Up B				3- Rent						4 - Xxmas Bells #1	5 - You Okay, Honey?		6 - Tune Up Reprise
	Score Pages	*1–2*		*3*		*4–7*				*8–25*						*26*	*27–31*		*32–33*
	Libretto Page	**1**	**2**	**2**	**3**	**3**	**4**	**5**	**6**	**6**	**7**	**8**	**9**	**10**	**11**	**11**	**11**	**12**	**13**
Justin Cooke	Mark	+X	X	X	X	X	X	X	X	X	X	X	X	X	X	(X)	(X)	(X)	X-
Zachary Keenan	Roger	+X	X	X	X	X	X	X	X	X	X	X	X	X	X	(X)	(X)	(X)	X
Brandon Harris	Tom Collins					+X	X	X	X	X	X	X	X	X	X	X	X	X	X-
Paul Hibbard	Angel									+X	X	X	X	X	X	X	X	X	X-
Lance Newton	Benny						+X	X	X	X	X	X	X	X	X-				
Samantha Pauley	Mimi									+X	X	X	X	X	X-				
Hope Parow	Joanne										+X	X	X	X	X-				
Katie Bakalars	Maureen									+X	X	X	X	X	X-				
Mark Sopchyk	Gordon/Rest Man/Season Solo/Cop/Ens									E	E	E	E	E	E				
Sarah Shervey	Ali/Ensemble									E	E	E	E	E	E				
Lindsay Van Norman	Pam/Seasons Solo/Ensemble									E	E	E	E	E	E				
Elizabeth Metz	Sue/Ensemble									E	E	E	E	E	E				
Austin Hernandez	Steve/The Man/Ensemble									E	E	E	E	E	E				
Jake Voss	Homeless/Junkie/Ensemble									E	E	E	E	E	E				
Laura Tracy	Homeless/Ensemble									E	E	E	E	E	E				
Donnie Mezera	Blanket Person/Junkie/Ensemble						+H-			E	E	E	E	E	E				
Margaret Teshner	Homeless/Ensemble									E	E	E	E	E	E				
Dan Liska	Homeless/Bells Solo/Ensemble						+H-			E	E	E	E	E	E	+H-			
Matthew Matuseski	Paul/Vendor 1/Pastor/Ensemble									E	E	E	E	E	E				
Shannon McDonald	Vendor 2/Mrs. J/Moon Backup/Ens									E	E	E	E	E	E				
Christine Walth	Coat Vendor/Mrs. Cohen/Ensemble			+MC	MC-					E	E	E	E	E	E				
Nicky Hilsen	Alexi D/Moon Backup/Mimi Mom/Ens									E	E	E	E	E	E				
Andrew Kelly	Mr. Jefferson/Cop/Mr. Grey/Ensemble									E	E	E	E	E	E				
Amy Nelson	Roger's Mom/Cop/Ensemble									E	E	E	E	E	E				

Version 2: 6/21/10

X Onstage, +X Enter, X- Exit, +X- Enter/ Exit, (X) Onstage no lines
Other initials indicate ensemble character -Ensemble may be added to additional scenes

Page 1 of 5

Figure 3.10 A musical with no formal scenes. In this instance, songs are the most logical division markers

Distribution

The character/scene breakdown is a document you are likely to distribute both electronically and in hard copy. This means you will need to keep both sets of distribution rules in mind.

Production team members are overrun with paper, and, while the breakdown will be a useful document, it is not something they will look at every day. Sending it out via email or posting it on a show website will help ensure they can find it when they need it. So remember the electronic rules and consider the following:

- You've put a lot of time into finding the proper balance between text and white space, and between a title font with personality and a body font with legibility. But what if the recipients don't have your fonts installed? Will the document still be legible?
- Every computer will default to its own printer settings, not the settings of the printer attached to the document's creator. Your formatting work can easily get lost. Will the accessibility of the information be affected by a change in the available print area?

The PDF is the best choice for this document. You can guarantee that everyone will receive the information as you intend. And as a bonus, it doesn't matter if the computer is Mac or PC, new or old.

A third factor supporting the PDF is its *usability.* The character/scene breakdown is not an interactive document. You don't actually want anyone other than the SM team to make changes on their own. It's too complex a document to have multiple versions being independently edited. The PDF (with version number and date) creates a snapshot of what you know on the day it is created. Once changes have happened in rehearsal, you can update the document and email or post a new version.

`But remember that your actors are much more likely to read something you put in their hands. They will want a printed version. This makes it much easier for them to study it in conjunction with their script. So once you are done with the chart and think you have found a good font at a good size, appropriate shading, and well-balanced rows and columns, print out a page and send it through the copier. If it still communicates the information as effectively as the original, you have found a winning combination.

Meeting with the Director

Once the stage manager has completed the first round of theatre and script

investigation, it is time to meet with the director. You are now ready to ask show-specific questions and find out about the director's preferences and rehearsal needs. Even if you have a prior working relationship with the director of your show, it is advisable to carve out time for this meeting. You will always have a few questions to ask, and this also provides an opportunity to discuss if anything should be handled differently from previous productions.

If you have not worked with this director before, then this, in a way, is a second job interview. The director may not have been involved in your selection. You have the job—and you want to keep it! Beginning the working relationship with clear communication and mutual understanding will pave the way for successful interaction as things get more complicated.

With that in mind, review your notes and prioritize the information you need right now. Over the course of your career, you will develop a standard list of questions to be answered, which can serve as your starting point. If you do not have such a list yet, use the following information to create one.

Show Information

General thoughts. Before launching into your list of questions, allow the director to talk about the show in general terms. The focus of the director's comments can tell you which characters, scenic elements, or moments in the play he or she considers the most important. This can guide you later on as you schedule time for rehearsing that scene or consider how to word a note in a report.

Specific details. Get clarification about the questions in your production analysis. Now is when you can discover if the gunshot should be live or recorded, and if that has been discussed with the production team yet. Are there aspects of the show that will be different from other productions and necessitate rehearsal time, or items not immediately clear when reading the script? Do you need information to help you complete your character/scene breakdown? Do you need information about audition materials?

Current needs. Is the director waiting for information from any member of the production team that you can help acquire? Which pieces of your preliminary paperwork would the director like to see? To see before distributed to others?

Rehearsal Procedures

Rehearsal hours. In an academic setting, this would be the general rehearsal hours (if not standardized) and any planned deviations from that schedule. In an Equity setting, this would include preferences for the short or long day, if allowed under your contract.

Overall plan for rehearsals. Will the director begin with a read-through of the show? Will there be any days devoted to table work? How does the director approach blocking—putting a show quickly up on its feet or taking time for exploration before setting the movement? When should the actors be off-book? When does the director hope to see actors working with props? If this is a musical, how will the need for music, staging, and choreography rehearsal time be balanced?

Breaks and time. Will the director create a detailed schedule for the process or communicate priorities and let you work out the details? Does the director have a preference for five- or ten-minute breaks? How should you notify him or her when the break is due: a reminder slightly in advance or stopping rehearsal and calling it on your own? If a scheduled rehearsal is running past its allotted time, should you let the rehearsal continue or alert the director?

Actors' Equity Association specifies the length of the breaks given to actors while in rehearsal—five minutes after fifty-five minutes of work, or ten minutes after eighty minutes of work. An exception exists when running the show. Performers may complete a full act before stopping, receiving a fifteen-minute break if the act exceeded eighty minutes long. Many academic theatres use these breaks as a guideline for handling stops in their own rehearsals as part of their efforts to train actors and stage managers for professional work.

The room. Does the director have preferences for how the room is set up? If the complete groundplan cannot be taped on the floor, is there an area best omitted or condensed?

Guests and visitors. Are rehearsals closed? Are there any specific periods of time when even production team members might be asked not to stop by?

Special needs. Are there specific items the director likes to have in rehearsal? This could range from dramaturgical reference materials to a favorite snack food on stressful days.

Allow yourself sufficient time for the meeting, and choose a location free from distraction. You hope to receive the director's full attention as you ask questions, and you certainly don't want to be distracted yourself by the surroundings. At the end of the meeting, be clear about your next steps. If you promise to get information for the

director or provide copies of your paperwork, do so promptly. If the director needs to provide things for you, determine if a reminder is warranted. Some directors may request a call or email—especially if they are working on multiple shows. Others may find this just a bit too micromanaging. And if you cannot tell what is needed, there is never harm in sending a quick email after the meeting to thank the director for making time for you and reiterating how much you are looking forward to the show. Even without listing the things you are waiting for, this may be enough of a reminder!

Meeting the Production Team

If the director does not have all the answers you need, or if there are details requiring input or clarification from the designers, you can repeat the aforementioned scenario and request time to meet with members of your production team. Be sure to find out if there is a production meeting scheduled in the near future. If so, these questions can simply become agenda items or follow-up questions after the meeting ends.

If there is no production meeting scheduled soon, and you get the sense that important decisions still need to be made, check with the production manager or your supervisor/advisor. You might need to call for a meeting, send a group email, or take other actions to unite the players sooner than was intended.

The Prop List

After meeting with the director and designers, the stage manager should have answers to the show-specific questions generated during analysis of the script and can now generate and distribute paperwork to the team. First up is the prop list. Your prop list should contain both the relevant information from the script and the details about this individual production, so it is worth waiting until you can satisfy both of these objectives before sending it out.

Key Users

- Director and SM team
- Scenic designer and assistants
- Props master
- Costume designer or assistant if there are relevant items

What it contains

- Page number
- Item
- Details about who uses it and what happens to it

Why do it?

- To provide a complete listing of the furniture and actor-handled items in the show
- To identify overlap items (such as umbrellas) so they can be claimed by the correct department
- To facilitate budgeting in the props department by noting consumables or specialty items
- To set up a method for updating these details throughout the rehearsal process

Before setting out to create the prop list, the stage manager should find out if the theatre has a preferred format for the document. In a department or company with multiple productions at a time, the props personnel may find it simpler to have all lists conform to a single setup, so that their work can focus on seeing the details and not learning how to navigate the page. If this is the case, you are wise to use the provided format. If none is provided for you, or if that sort of consistency is not relevant, then the organization of the information is up to you.

In either case, this is both a detail document and an interactive one. The stage manager's goal is to provide a comprehensive accounting of the items needed for the show. The list will be updated regularly throughout the process, so that it always contains the most up-to-date information.

The simple format shown in Figure 3.11 provides a method for recording all of the needs of the production. It contains a few theatre-specific columns, but ones that are worth considering as good general additions. Column three provides a place for a quick reference as to whether or not a prop is consumable. This can aid a props department in accurately budgeting for the item, and the SM team in making sure there are adequate quantities available.

A **consumable** prop is one that will be used up during a single performance. This may refer to food or drink eaten each night, but can also identify a piece of paper that is ripped up, a candle that is lit on stage and may not survive the entire run, or anything else that would need to be restocked.

The theatre for which this prop list was developed also likes to be able to track progress on the document. The R and A columns provide check boxes to mark when a suitable rehearsal item is provided, as well as when the actual show prop is acquired. The "source" column allows for noting a specific location in the prop storage room or details about a rental. The stage manager may never enter information here, but an interactive document should be set up for all users. I have also worked for theatres that like to include budget information on the prop list as well, foregoing the need for a second sheet to track costs.

For a show with multiple locations, it may be useful to provide some further subdivision on the prop list. While a show like *Cat on a Hot Tin Roof* takes place in a single locale, *Twelfth Night* features several settings. Rather than including the setting to which each prop belongs in the notes column, a location subheading provides that information for a set of props, allowing that notes column to contain other information.

It is also important to note that the choice to work in this level of scene-related specificity necessitates being consistent. Although II-2 has no prop requirements initially, in this instance it is clearer to list the scene with no props than to skip over it and leave the props personnel wondering if the scene is prop-free or was inadvertently omitted. Similarly, because the furniture pieces were repeated for each location—but not identically—it was worth clarifying that. The use of italics draws attention to the fact that these are repeat items and not additional requirements.

Working with the Prop List

The samples here are preliminary versions of a prop list, prepared before rehearsals begin. Given the range of personnel who will need a copy, neutral choices in font and layout are made to maximize readability on any computer. But because this is also an interactive document, it is not shared in PDF form. Doing so would preserve the formatting details, as this technique did for the character/scene breakdown, but it would make it more difficult for others to update it. As mentioned in Chapter 1, the prop list is one of the best candidates for a Google Doc, or to live in a Dropbox folder.

Speciality Charts

If you are working on a production with effects or other specialty needs, it may be helpful to take time during the pre-production phase to assist in the summarizing and distributing of this information as well. A production of *Dracula* will inevitably feature a great deal of blood, along with special effects to accomplish mysterious appearances

LITTLE SHOP OF HORRORS

PRELIMINARY PROP LIST

Page	*Prop*	*C*	*Character*	*Notes*	*R*	*A*	*Source*
FURNITURE/SCENIC ITEMS							
	Trash cans/garbage barrel			Multiple, possibly danced on			
	Outdoor bench						
	Refrigerator						
	Antique dentist's chair						
	(3) Stools			2 work table, 1 counter			
	Counter						
	Work table			Old			
	Coat rack						
	Shiny new work table						
	Sign		On door	"open" "closed"			
18	Dust pan		Audrey				
18	Broken flowerpots		Audrey	In pan- "terracotta" pieces			
21	Food TBD		Wino #1	Will eat from trash can			
21	Roses		Audrey	Limp, lifeless			
22	Pod #1		Seymour	Large, but sickly; expandable			
24	Cobweb		Set Dressing	On register			
24	Roses		Audrey	Dead			
24	Monster movie magazine		Crystal	Oversized			
26	Plant food		Seymour				
26	Spray/spritzer bottle		Seymour	For watering plants			
27	Blood	*	Seymour	Pricks finger, and feeds Audrey II			
28	Transistor Radio		Mushnik				

Version 1: 5/22/13 NOTE: "C" denotes consumable- props with asterisk will need replenishing Page 1 of 2

Figure 3.11 The preliminary props list for *Little Shop of Horrors*

Twelfth Night

Preliminary Prop List

Page	*Prop*	*C*	*Character*	*Notes*	*R*	*A*
I-1 Orsino's Palace						
3	(2) lounge chairs and side table		furniture			
3	Musical instruments		TBD	Depends on casting		
4	Letter		Valentine	From Olivia to Orsino		
I-2 Illyrian Coast						
5	Coins (gold)		Viola	Gives to Captain		
I-3 Inside Olivia's House						
8	Table		furniture	To set down food and wine		
8	(1) wooden chair with no arms		furniture			
8	Food	?	Toby, Andrew	TBD may not be eaten		
8	Wine	*	Toby, Andrew			
8	Cups or Mugs		Toby, Andrew			
I-4Orsino's Palace						
	Repeat lounge chairs and table					
I-5 Inside Olivia's House						
14	(2) high-backed chairs with arms		furniture			
14	shrine		furniture	To Olivia's deceased brother		
14	Photo		dressing	On shrine Olivia's brother		
14	Candles	*	dressing	On shrine lit		
14	Flowers		dressing	On shrine		
24	Ring		Olivia	Given to Viola costumes?		
II-1 A Lodging in Illyria						
24	Bench		furniture			
24	Coat Rack		furniture			
II-2 A Street Near Olivia's House						
II-3 Inside Olivia's House						
	Repeat table, wine and cups (no chair)					
27	Food	*	TBD	Set on table with wine		
28	Sixpence		Toby	Given to Clown		
II-4 Orsino'sPalace						
	Repeat lounge chairs and table					
34	Towel		Orsino	Comes out of pool		

Version 1: 10/17/10 NOTE: "C" denotes consumable- props with asterisk will need replenishing Page 1 of 2

Figure 3.12 The preliminary props list for *Twelfth Night*

and exits. A production of *The Tempest* will not be complete without some manifestation of Prospero's magic. You may only start out with a list of where effects will be needed, with no specific departmental assignment or method of implementation. Working again from your production analysis and supplementing the details with the results of your initial meetings with the director and designers, the SM might opt to create a second interactive chart to live in a shared location so that it can be updated throughout the process.

Auditions

Auditions for a show are a period of both information distribution and discovery for the stage manager. You will be relaying key production details to your potential cast and collecting information both formally and informally about them. Often this is the stage manager's first simultaneous test of verbal and written communication skills on a production. Many of the key traits of a successful stage manager will be needed—organization, flexibility, clarity, and quick thinking.

The stage manager's concerns regarding auditions can be broken down into three major groups: the space, the show, and the schedule. The checklist in Figure 3.13 provides a starting point for planning successful auditions. While not every question will apply to every show, it is a good reference.

It is important to note that some of the checklist questions require action on your part, and others may require answers or assistance from other theatre personnel. Of course you will need the director to provide you with information about the sides or to answer questions related to the setup of the room and the ideal flow of the day. But other questions, especially space-related ones, are equally important to be asked in advance. Never wait until the day of auditions to go exploring. It is always better to know in advance that signs can be affixed to the wall only with a specific kind of tape, or that it requires calling a security guard to open rooms.

Sides: Excerpts of the script chosen by the director for the actors to read at auditions. Typically one to two pages in length, the SM will label the sides with the appropriate character names and make enough copies so that one group of actors can read them in the audition room for the director, and other groups can practice the material outside.

As you collect and create information to be posted at the audition site, be sure that you are communicating approved details. There might be a reason your director prefers your calendar to list a more general time for rehearsals rather than specific adjustments for individual days; there could be someone pre-cast whose name has not

AUDITIONS CHECKLIST

THE SPACE

- [ ] What is the procedure for locking/unlocking the audition space? Will you have keys?
- [ ] Are there special considerations for accessing the room in the evening or on weekends?
- [ ] Does the space have adequate signage to help actors find the room?
- [ ] Can you post additional signs?
- [ ] Is there an area which can serve as a check-in spot?
- [ ] Is there an area for actors to wait? To warm up?
- [ ] Is the lighting sufficient in the rooms?
- [ ] Is the temperature of the rooms comfortable? Adjustable?
- [ ] What is the floor surface of the audition room? Is this acceptable for what you need to accomplish?
- [ ] Does the room have mirrors?
- [ ] Does the room have a piano or a CD player?
- [ ] Are there sufficient tables and chairs?
- [ ] Does the director have preferences about how the room is set up?
- [ ] Can you leave the rooms set up from one day to the next?
- [ ] Are basic office supplies available to you (pencils, staplers, tape, etc.)? A copier if we run low on forms?
- [ ] Will you have access to any basic first-aid supplies in case of injury?

THE SHOW

- [ ] Does the theatre have a standard audition form?
- [ ] Are there show-specific questions to be added?
- [ ] Does your theatre require any additional paperwork?
- [ ] Do you have a basic summary of the show and available roles? If not, is this something you should create?
- [ ] Do you have your basic overview calendar?
- [ ] Do you have information about the scenes/songs actors have been asked to prepare?
- [ ] Will there be additional sides for callbacks?
- [ ] Is there a camera available for actors who may not bring headshots?
- [ ] What are the components of this audition process? In what order will they happen?
- [ ] Will you be asked to read with the actors?
- [ ] Who will be in the room with the director?
- [ ] Does the theatre or director have policies regarding youth auditions?

THE SCHEDULE

- [ ] What is the overall time for the auditions?
- [ ] How long will individual slots be?
- [ ] Will actors sign up in advance or upon arrival?
- [ ] Does the director have preferences for building breaks into the process?
- [ ] If the audition spans meal time, are there considerations for scheduling around and/or acquiring food?
- [ ] What are the date, time, and location of the callbacks?
- [ ] When will casting decisions be made?
- [ ] How will actors be notified?

Figure 3.13 A basic checklist for any set of auditions

been released because the contract is not yet finalized; there might be an important question to be posed to actors that will help solidify a pending costume question.

When working on an Equity show, the stage manager will encounter additional rules regarding principal and chorus auditions, handling of nonunion actors, and specific requirements for the spaces themselves and the way notices are posted. Guidelines can be found in the agreements governing each category of AEA contracts. In fact, the stage manager of an AEA production may not even be part of the audition process.

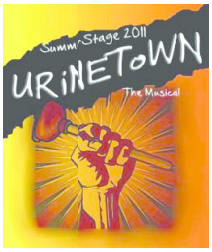
The Audition Form

The stage manager's primary tool for capturing information about the potential cast is the audition form. Like the prop list, many theatres have specific documents they prefer to use. In an academic setting, this is often standardized paperwork that may include releases you are required by the university to collect. In a professional setting, actors represented by agents who schedule auditions for them may not fill out a form at all but simply provide a resume and headshot.

If you are creating the audition form, focus on collecting several necessary types of information: basic contact and descriptive information about the actor, answers to show-specific questions, and details about schedule and potential conflicts. Figures 3.14 and 3.15 demonstrate a way to capture the necessary facts in a two-sided form. The stage manager may not have much time to review the forms during the audition day, but, if possible, you should get them back from the director prior to callbacks. That way you can determine if any of the information provided was unclear—or omitted—and get a second chance to obtain those details before casting begins and missing information is problematic.

The formatting needs of the audition form are simple: present the information requests clearly and provide sufficient room for the replies. Actors should know what is being asked, and the director should easily find the answers. The concept of white space is perhaps the most important formatting principle in this situation. Take a second look at the section of the sample form where show-specific details for *Urinetown* are sought. The two questions to be answered may be in bold, but the space around the questions contributes to the legibility as well. Reducing the white space might make room for the résumé information at the bottom of the front side, leaving a larger area on the back for the director's comment box. That could seem like a useful choice. But consider the importance of those show-specific questions. One is related to the start date of rehearsals, and the other to a remount of the show. The answers to both of these questions will impact many more people than just you and the director,

AUDITION INFORMATION FORM



NAME				
Local Address				
Phone	Email			

Affiliation	UW–L Student	Viterbo Student	Faculty/Staff	Other
Academic Status (circle one)	1st Year	2nd Year	3rd Year	4th Year	Grad Student
Major		Minor		
Height	Weight	Hair Color		

Are you willing to alter your physical appearance (i.e. color or cut your hair) for a specific role?
Yes _____ No _____. If "no", please explain.

Do you sing? _____Part? (Soprano, Alto, Tenor, Bass) _____

Dance Experience _____

Do you play an instrument? _____What instrument(s)? _____

IMPORTANT DETAILS ABOUT URINETOWN

The show will rehearse during the summer from May 31–June 29. Rehearsals are generally Monday through Friday in the evening. Costume fittings and similar activities will be scheduled during the day. The show will perform June 30–July 10.

Please answer the following questions:

1. **Would you be available for early rehearsals during the week of May 23?** YES NO

   If "yes" please indicate whether afternoon or evening would work best for you_____

2. **Would you be available for a fall remount of this show September 8-11?** YES NO

   The remount is not certain at this time, but would be on those days if it happens

Do you currently have a full- or part-time job? _____(including campus employment)

- If "yes" please indicate your likely summer work schedule on the back of this sheet.

Are you willing/able to re-arrange your schedule to accommodate rehearsal? _____

- If "no" please explain:

Please fill out the information on the back side too! Thanks!

Please **attach resume** or provide a brief history of previous roles.

ROLE PLAY THEATRE

SUMMER SCHEDULE INFORMATION

Please mark out any class or work commitments that you will have.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
8am							
9am							
10am							
11am							
12noon							
1pm							
2pm							
3pm							
4pm							
5pm							
6pm							
7pm							
8pm							
9pm							

Please list ANY potential conflicts with summer/fall evening rehearsals (job, weddings, etc.). This does not disqualify you automatically from casting! But it is much easier to work around a conflict that we know about in advance.

DIRECTOR'S NOTES

Callback for: Cast as:

Figure 3.14 and 3.15 A sample audition form

and obtaining clear and accurate information up front is a priority.

If a single show is holding auditions, then the stage manager is done thinking about the form at this point. But if multiple shows will audition at once—common in academic settings—then the participating stage managers should consider the best way to get forms to all directors involved. Each will want to review the actor's details, and record notes on the form. It is impractical for them to share, or to wait until the end of the night to receive paperwork. One choice would be to photocopy each form as it is turned in to create a set for each show. Alternately, you could consider multiple forms. This is a bit more work for the actors as they will fill out information twice, but might be the most feasible option if copier access is limited. In the case of multiple forms, it is advisable to make only one set on plain white paper. By using colored paper for the other show, the SM teams can easily sort forms and lessen the chance of having two copies of Actor B's information end up in one pile and none in the other.

What the Stage Manager Can Learn

Over the course of the auditions, the stage manager will learn a great deal. Of course you will meet your potential cast, but you will discover not just who they might be but also how they work. Actors who are early, prepared, and specific with their questions will strike a contrast to those who arrive late, forget their sides or music, or ask the same question multiple times. This does not tell you anything about the quality of their performance but may be an indicator of necessary strategies for assisting those actors with memorizing lines or remembering rehearsal call times.

The stage manager can also learn about the director. If you have not worked with him or her before, this is perhaps even more valuable information than you acquire about the actors. Does the director hold to the set schedule? What is the response to a gentle reminder that the day is running behind? Did you receive very little information up front and are now asked to prepare multiple sides on the spot? What happens if you are running ahead?

Another First Impression

The stage manager should recognize that auditions also provide the actors and director with their first opportunity to see you in action. Your ability to organize the day will be seen as an indicator of how rehearsals will go. And while it is important to be friendly and helpful, it is equally important to be neutral and professional. Can you answer questions while still maintaining confidentiality about details not yet released? Can

you respond effectively to schedule changes, whether prompted by whimsy or genuine necessity? Can you troubleshoot unanticipated problems? Can you display empathy for a disappointed performer without taking sides?

Particularly as a new stage manager, it can be easy to get pulled into the chaos of a large cattle call or to let your excitement about being "in the know" affect your comments. Your efforts to set the right tone now will pay off throughout the production.

If the stage management team is assembled, the audition process is a great opportunity for the stage manager and assistant stage managers to begin working together. If the director requests the SM's presence inside the audition room, you will need someone outside to handle the crowd. And even if you are not in the room, having someone to help set up, locate an actor who has wandered away, or make an emergency run to the photocopier if you are running low on sides for forms can be invaluable. If the ASM is new to you, then any lulls in the day's activities will give you time to simply get to know this person and to discover how he or she will best fit into the mix.

Organizing the Auditions

The stage management team will need an organized table for the auditions. You will need blank audition forms, basic supplies including pens, highlighters, blank notepads, and a stapler to attach headshots to the forms, a work space for writing down who has arrived and what time they will be seen, and space for laying out other show information. This might include a very preliminary version of the actor calendar and descriptions of the characters. Individual schools or theatres might have additional release forms or standard documentation which need to be available as well.

If your audition process extends over multiple sessions, the initial day of introductory auditions, which could be either monologues/songs actors prepare in advance or cold readings from the script, will be followed by sessions for the director to call back specific actors for specific roles. Particularly in an academic or community-based setting, more actors will be called for this evening than will end up in the cast, and actors may be under consideration for more than one part in the show. Figure 3.16 shows a typical callback list. (**Important note:** If the stage manager is given the information and asked to prepare the callback list, it is very useful to organize the individual actors for a role in alphabetical order. It will make it quicker to check them in at the callback session, and removes any perception that there is a "ranking" from the initial night. There are no politics in the alphabet!)

YOUNG FRANKENSTEIN
CALLBACKS

Frederick
Justin Cooke
Seth Von Steidl
Maxwell Ward

The Monster
Quinn Masterson
Connor O'Hara
Alex Taylor

Kemp
David Holmes
Quinn Masterson
AamerMian
Lewis Youngren

Hermit
Tanner Costello
David Holmes
Quinn Masterson
Connor O'Hara

Igor
Quinn Masterson
Seth Von Steidl
Maxwell Ward
Lewis Youngren

Elizabeth
Erica Bush
Lily Cornwell
Rebecca Johnson
Katie Katschke
Maddie Napolski
Katy Williams

Inga
Anna Mae Beyer
Erica Bush
Lily Cornwell
Rebecca Johnson
Maddie Napolski
Jandrea Novak
Casey Schneider

Frau Blucher
Anna Mae Beyer
Callie Boydston
Lily Cornwell
Jessie Fanshaw
Katie Katschke
Jandrea Novak
Casey Schneider
Crystalia Varelis

SCENES

5. Monster, Kemp, Inga, Frederick, Elizabeth, pp. 106–109

Monster	*Kemp*	*Inga*	*Frederick*	*Elizabeth*

6. Hermit & Monster, pp. 82–83

Hermit	*Monster*

Figure 3.16 and 3.17 The callback list for *Young Frankenstein* and an excerpt from the callback matrix.

Once the stage manager is in possession of that callback list, he or she can make that next round of auditions run much more smoothly by doing a bit of preparation. Callbacks are typically based on show-specific material. This is the time you will be using the sides you prepared. If multiple actors are under consideration for a role, then each will need to read that side. And the director will have an opinion about who reads with whom. In addition to general suitability for a role, a director will be looking for chemistry between actors. So it will not be up to you to decide on the pairings. You will need to communicate to the actors how the readings will progress and to ensure that everyone who has been called back is accounted for. Often you will not receive the specific pairing information until just before the session begins. Of course you have a notepad with you on which you can write down all the details, but can you be better prepared.

My personal strategy is to create a callback matrix. It requires very minimal formatting, and allows me to capture the director's wishes much more clearly than scribbles on a notepad. Figure 3.17 is a brief example of how it works. The table format provides specific cells for writing. The number of columns is determined by the number of characters in a particular scene or song, and the number of rows is determined by the number of actors needed—always based on the maximum number of actors who will need to be seen. Because seven actresses have been called back for the role of Inga, Scene Five will be read seven times. And because only three actors are called for Frederick, each will read the scene at least twice. The matrix can easily capture all seven combinations of the scene, and in the order in which the director wishes them to enter the audition room. Each table is created independently so that it can be adjusted. Scene Six only features two characters and a maximum of four actors reading for a single role, so that table is built to that size. Because of its simplicity, creating the matrix is likely only a twenty- or thirty-minute project—but one that pays off immensely.

If the stage manager receives information from the director in advance of the callbacks, he or she can invest the time to type up the matrix. But if not, then the completed hand-written matrix could be quickly run through a photocopier and posted, or at a minimum kept at the check-in table. Both the actors and the stage managers have legible information at their fingertips to make sure that each group is ready in the correct order and that an actor reading in multiple pairings is working with the right group at the right time.

The Contact Sheet

At the conclusion of auditions, the stage manager will be ready to create the final set

of paperwork during this pre-production time: the contact sheets. You will develop separate lists for the cast and production team, ensuring easy communication with these personnel throughout the rest of the show.

Next to the calendar, the contact sheet is perhaps the most distributed piece of paperwork. Certainly everyone whose name appears on it will need a copy. But distribution is likely to extend beyond the immediate participants. The theatre business office may need the information for handling contract and payroll details, the costume shop may want a copy for contacting an actor to cancel a fitting outside of rehearsal time, or the publicity office may wish to phone or email participants to request participation in interviews or other PR events. Most of the time such requests and scheduling will pass through stage management, but occasionally there is a reason for independent communication.

When collecting information for the contact sheet, consider what will be most needed. Mailing addresses, for example, might be useful at the conclusion of a show, but you are unlikely to contact people by mail during rehearsals. An exception to this may be actors staying in company-provided housing at a professional theatre. But although addresses may be useful in this case, it would be temporary local information rather than permanent details. If the stage manager creates the contact sheet using spreadsheet software, information might be recorded now but then hidden when printed and distributed if not currently relevant.

Privacy will also be a factor in the inclusion of information. In an academic setting, a faculty director may wish to have only an office phone number in print. The director can always decide to share a home number or cell phone number with specific individuals. Actors who have a need to maintain privacy for personal reasons might provide the stage manager with a phone number but request that the stage manager list his or her own number opposite that actor's name on a contact sheet. Attempts to reach the actor could still be successful, with the stage manager passing along messages or providing that number on a case-by-case basis, depending on the actor's situation. Use your discretion and respect the needs of your company members.

To Post or Not to Post?

For reasons of privacy discussed here, it is rarely advisable to post a contact sheet with personal information online or on callboards in the theatre. Once this information is public, it is impossible to control who has access to the numbers or to keep someone from using them inappropriately. Consider distributing only in hard copy or to a very limited list via email, or posting such documents to a show website only when

password-protected access is possible. This can lessen the chance for information to be misused.

Formatting the Contact Sheet

As was true for the prop list, a simple chart or table format serves the contact sheet best. This keeps information organized and gives you control over individual cells. Similar to the callback list for auditions, it is this author's preference to list personnel in alphabetical order by last name, thereby removing any implied hierarchy. (Why is the assistant lighting designer listed above the costume designer? Why is Ensemble Member C listed before Ensemble Member B?) I also prefer to order the columns so that name, role, phone number, and email address appear in that order.

Because you are less likely to update a contact sheet than other paperwork, take extra care to proofread it before distributing it to anyone. Make sure you have not transposed digits in phone numbers or listed an email address as a ".com" if it is a ".net." Double check the spelling of names. If an actor prefers to go by a nickname but needs his or her paycheck addressed to a given name, include both. AEA only allows one actor or stage manager to have a specific name. If the Susan Jones in your cast was the third so-named person to join the union, she may actually be known as "Susan Andrea Jones" or "S. Jones" for official contracting and publicity purposes, no matter what she asks to be called in rehearsal. If a cast or team member's name is commonly mispronounced, consider how you might include that information. It is also increasingly important in today's workplaces to provide personnel the opportunity to specify preferred gender pronouns. If this feels awkward to include on the contact sheet, be sure to identify a method to share that detail with the necessary people or inquire how it has been previously handled in your department or theatre.

The sample contact sheet provides a basic layout and also identifies another specific formatting preference of this author. Although three of the four columns are left-justified, the phone number column is right-justified. Observing the two sample phone numbers demonstrates why. If only a few members of a company have an out-of-town area code, this formatting allows that area code to be slightly more prominent in this setup. This can be especially helpful if the stage manager's office phone requires dialing a variety of access numbers. (My current office phone requires one method for internal calls, a second for off-campus and local cellular calls, and a third for long-distance numbers.) As a stage manager, if it is your preference to always include the area code, or if your phone is less convoluted than mine, this detail will be less essential for you.

Another important consideration is the need to include additional numbers

Twelfth Night

CAST CONTACT SHEET

Version 3 11/2/10

*Unless Noted, Area Code 608

Suzanne Clum	Musician	333-555-1212	actor1@provider.net
Brian Coffin	Lord 1, Sailor 2, Officer 3	555-1212	actor2@provider.net
Justin Cooke	Orsino		
Allyssa Dunn	Olivia		
Kevin Fanshaw	Antonio, Feste understudy		
Claire Ganshert	Viola		
Jacob Gustine	Sir Toby Belch		
Donald Hart	Lord 2, Officer 4		
Alden Hedges	Feste		
Austin Hernandez	Valentine, Sailor 3, Officer 1		
Andrew Kelly	Malvolio		
Shelby Krarup	Musician		
Matthew Matuseski	Sebastian		
Tim McCarren	Sir Andrew Aguecheek		
Donnie Mezera	Fabian		
Amy Nelson	Maria		
Luke Prescott	Curio, Sailor 1, Officer 2		
Lindsay Van Norman	Olivia Attendant 2		
Jake Voss	Sea Captain, Priest, Antonio understudy		
Emily Ware	Olivia Attendant 1		
Walter Elder	Director		
Laurie Kincman	Stage Manager		
Melissa Heller	Assistant Stage Manager		
Quinn Masterson	Assistant Stage Manager		
COSTUME SHOP			
BOX OFFICE			

Electronic callboard: http://www.uwlax.edu/theatrecallboard/twelfth_night.htm

Page 1 of 1

Figure 3.18 A sample actor contact sheet. Note that phone numbers and email addresses have been removed for privacy reasons. "expiry":

beyond the cast or staff. The sample is a contact sheet distributed to the cast. For their convenience, the costume shop and box office phone numbers have been included at the bottom along with contact information for the director and SM team. On a production contact sheet, the stage manager might include shop numbers, fax numbers, or even the theatre's mailing address if that will be necessary for nonresident staff arranging for equipment to be mailed or shipped.

Because this theatre maintains an online callboard, the web address is also included at the bottom. And as with all other paperwork, a version number and date can be found.

Thinking About the SM Team

As an exercise in multitasking, try the following task:

1. Pull out your favorite *Where's Waldo?* cartoon and find all the Waldo images in five minutes.
2. While doing that, turn on the *Rent* soundtrack and accurately sing along to "La Vie Boheme."
3. And because you are the ambitious sort, do this in a restaurant, and also count how many times the server in your area refills someone's glass of water.

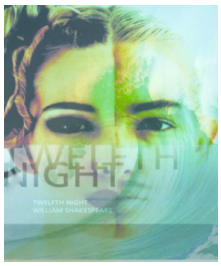
Well, it's not much crazier than trying to write down blocking, follow along with the script, keep an eye on where the props are going, and help the actress in the next scene lace up her corset all at once. Both sets of tasks are much easier when undertaken by a team.

If you are lucky enough to be working with one or more assistant stage managers, it will be crucial to the show's success to use your ASMs wisely and empower them to help document everything that is going on. As you reach the end of your prep period, you will know which aspects of your production might be the trickiest or the most complex. Use that as a guideline to develop a "divide and conquer" approach for the SM team so that all the necessary tasks get done each day, and no one goes too crazy in the process. Of course, the stage manager needs to keep on top of everything and to check in with all production areas. Delegating responsibility is not the same as abdicating it.

By sharing focus on the show, each member of the team can accept responsibility for tracking one set of details and following up on questions in that area. The team as a whole can tackle large projects and the daily setup, and meet regularly

Twelfth Night

SM Team Assignments



STAGE MANAGER	ASM #1	ASM #2
Lights/Sound/Projections	Costumes	Scenery& Props
Projections Cue Sheet	Costume Plot/Shift Plot	Preset List/Shift Plot
Prompting/Line Notes	Prompting/Line Notes	Prompting/Line Notes
Booth	SR	SL

ASM #1

1) Help to set up the theatre each night for rehearsal.
2) Make sure SM and actors know what rehearsal costumes are available, and that we're using them.
3) Update Character/Scene Breakdown as needed.
4) Track all costume changes.
5) Check in with the costume shop outside of production meetings as needed.
6) Create costume plot/quick-change plot.
7) Work with ASM #2 to create shift plot.
8) Once cast is off-book, share responsibility for prompting and line notes during rehearsals.

ASM #2

1) Help to set up the theatre each night for rehearsal.
2) Know what rehearsal props we have, and what will be needed for each night's rehearsal.
3) Update Props List as needed.
4) Track all hand props and furniture.
5) Check in with the scene shop and prop shop outside of production meetings as needed.
6) Create Preset List.
7) Work with ASM #1 to create shift plot.
8) One the cast is off-book, share responsibility for prompting and line notes during rehearsals.

Figure 3.19 The stage management team assignments for *Twelfth Night*

outside of rehearsals to share information. By the time you reach the theatre, everyone needs to be an expert in all parts of the show. But during rehearsals, it is very difficult for one person to learn it all at the same time. And if you ever need to work simultaneously in more than one room, each member of the SM team should be knowledgeable enough to be effective.

> "Find, develop, and support good people, and they in turn will find, develop, and own good ideas."
>
> —Ed Catmull, *Creativity, Inc.*

Particularly in academic theatres, it can be easy to see the ASM as someone with little experience who can be relegated to sweeping the floor and setting out props. That is a big mistake. The assistant stage manager is your ally in this process. Before rehearsals begin, the SM should get the entire team together to talk about the production and to divide responsibilities. It often makes sense to ask one ASM to focus on prop details and another to concentrate on costumes. They can be on the lookout for rehearsal report notes specific to that area and take the lead in creating paperwork for those technicians. Once you move into the theatre, the ASMs will assume responsibility for running the deck and overseeing the crew. Getting them solidly involved in the show from the beginning ensures they will be invested in the production.

Figure 3.19 demonstrates one method for organizing that shared focus. For this production, each of the two assistant stage managers received specific assignments for tracking and note-taking. Even from the start, it is clear that tasks are interrelated, and that group effort will be necessary for overall SM team success.

Note that some of the tasks initially begun by the stage manager are now passed along to an assistant. The stage manager initially created the character/scene breakdown, but it makes sense for the ASM who will be tracking costume changes to keep that document up to date as it will overlap with their notes about those changes. Similarly, another assistant oversees managing the props list once it is created and uploaded. Based on the focus each one will have during rehearsals, the stage manager has also articulated primary responsibility for starting various pieces of paperwork that will be needed by the crew. This type of approach can keep a large show from feeling too overwhelming at first, and allows each member of the team to be efficient with his or her time. AEA contracts specify the amount of prep time given to the assistant stage manager. It is often not a full week like the SM, but even a few days provides the opportunity to learn one another's working styles, get up to date on the production details, and create a plan for the show.

Next Steps

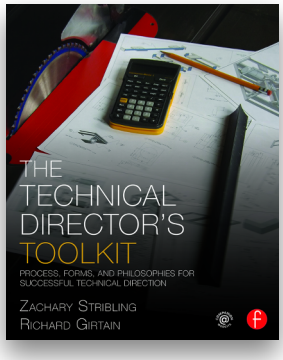
In addition to the meetings and documents featured in this chapter, the stage management team will typically undertake several other tasks during this phase of the process. These include taping out the groundplan on the rehearsal room floor, setting up the room itself to best facilitate the work, collecting rehearsal props and costume pieces, and preparing the prompt book. (These items are discussed in detail in the next chapters.)

At the conclusion of the stage manager's pre-production time, he or she should be prepared to enter rehearsals and begin capturing and sharing the details of the show.

CHAPTER 4

Communication, Collaboration, and Flexibility: The Mores of Success

4. Communication, Collaboration, and Flexibility: The Mores of Success



The following is excerpted from *The Technical Director's Toolkit* by Zachary Stribling and Richard Girtain. © 2016 Taylor & Francis Group. All rights reserved.

Learn more:

Theatre is a truly unique art form, as we work collaboratively as a group to create, teach, and entertain. While some studio art is created by a collective or team, there is no one person theatre. We are obligated by the nature of our passion to work alongside others, to share in a vision, and to help realize something much greater than one's self. Swimming in a sea of theatre artists are the facilitators like the technical director, or TD for short. We are artistic individuals, large-scale sculptors of environments, but our endeavors are grounded in a pragmatic knowledge of material sciences, tried and true construction methodologies, organized behaviors, and physics. These analytical activities and practical knowledge bases are blended with our artistic sensibilities and drive to create, giving us the unique foundation necessary to succeed as a theatrical TD.

Our job is a genuine original, a rollercoaster ride of new projects, conflicting emotions, and uncertainty. Some have likened it to herding kittens in the dark. We think it is one of the most beautiful things we have done in our lives. It is a career choice that with every opening night fulfills a drive to create, validates us as artists, affirms our leadership, and sets us off on another soon to be realized adventure. We rarely end up doing the same thing twice. Every production is unique. Even if we have done the show before, the list of players and their ideas are different. There is no repetition or rut to be found. The job description is constantly changing. The technology utilized is always evolving. The solutions and challenges are often different. If you are a person that thrives on routine and certainty, then the theatre and Technical Direction are probably not for you.

To borrow from F.D.R.'s three-legged stool metaphor, the first leg of a successful TD is collaboration. In this line of work you have to be able to play nicely with others. Creating theatre is a truly collaborative experience, and it happens among a small community. For an art form spanning millennia and every pocket of the civilized world, the group of active artists is remarkably small and interconnected. To keep getting work, we have to be people persons and exercise strong communication skills. Tread lightly and make no enemies. Be a pleasure to work with by being dedicated, responsible, and a team player. There is no *us* against *them* in theatre, only teammates working toward a common goal. We are not being Pollyanna about the way relationships work within the theatre community. There will be people you will like and dislike working with your whole career, but it is your responsibility to keep it professional and continue plugging away toward your common goal with a collegial attitude and dedication to the project.

The number one complaint in any organization, despite how well they do it, is

the second leg of our stool: communication. It is a vital ingredient to successful collaboration, and as a TD you must master it both as an interpersonal skill and as an organization skill. You have to get people to trust and follow you, and communication is the key to both. Learning how to talk to people is an art unto itself. Doing it successfully requires assessing what each individual needs to make them feel listened to and respected. These sentiments lead directly to them hearing you and not just listening to you. Be it a member of your staff like a carpenter, a scenic designer as a collaborator, or a producer as a stakeholder, you have to learn how to read the individual and react appropriately to their needs and personality type. Organizing information is just as important as a TD. You cannot just spew every fact and figure regarding your technical design, estimate package, or build schedule upon anyone needing details. Again, you have to be able to assess their readiness as to what information they specifically need and in what form and level of detail. Putting together information that makes sense is just as important as putting together information that is valid and thorough.

The third leg to the stool that is success in technical direction is flexibility. The nature of our work demands it. We are called upon to create a different dream every production, and our methodologies for doing so must shift with the individual needs of the design. We have to change the way we communicate with every designer that we work with according to their working style and level of readiness. Our process itself needs constant revision and improvement so that we might do our job even better on the next production. As the technology utilized in our field changes, as it does so rapidly these days, so must we change the way we dictate a build to utilize the most efficient and up-to-date construction processes. Finally, we have to be flexible enough to change the responsibilities and nature of our job as the description of our duties varies wildly from organization to organization and even season to season. H. G. Wells penned in *Mind at the End of Its Tether*, "Adapt or perish, now as ever, is nature's inexorable imperative." Our world, macro and micro, demands it of us, and to succeed in our field we must be ready to change to suit the needs of the organization that we choose to be a part of.

These are the guiding principles that we believe form the foundation upon which you can build a successful career as a professional TD. This section of the book will cover how to manage yourself and the relationships with your collaborators in a way that reflects these core beliefs. Coming back full circle, in the last chapter we will expand upon how we as TDs can work more effectively with our specific collaborators. This is not *the way*; it is *a way*. I hope that these mores that we hold dear help you to build a set of professional ethos that help guide you to success in all of your endeavors theatrical.

1.1 The Job: Never the Same Story Twice

Like an old fish tale your father has told you and your family countless times, the details of the TD's job change every time. Pinning down your specific job description is like catching a minnow with your bare hands. Like we said before, by the very nature of what we have to create our job is randomized. One week we might be engineering an articulated wall of aluminum and Styrofoam faux concrete and a month later be reproducing a sitting room from an eighteenth-century Parisian salon. You just never know what the next show is going to bring as a challenge, and to succeed you have to embrace the unknown and attack it with confidence and authority. Even if you have no idea how to build it and have never done anything like it in your history, you have to know in your heart that within your toolkit and community of contemporaries lies the solution, and have the confidence that you can both draw it out and execute it flawlessly.

Every day we thank the heavens that, like in the movie *Office Space*, we don't work in a cubicle, filing the same TPS reports every week and coveting iconic office supplies for thrills. Instead we work in a dust-filled fantasy land where sparks fly, and we harness the elements to do our bidding and build the things dreams are made of. We create play scapes, islands, living rooms, forests, and seeming endless expanses of desolate isolation where everyone from Patrick Stewart to your Aunt Maggie's tenth-grade daughter becomes someone else to tell a story. We give people emotional release, hope, despair, and escape. We create magic, and rest assured every month you can find yourself confronted with a fresh challenge requiring you to think outside the box and innovate. There is never a dull moment, and we are blessed by this apparent chaos.

Like the production challenges that we face, our job description is constantly under revision and development. Organizations are living organisms, forced to move and adapt to their market and climate. A stagnant theatre company is one that will soon close its doors for good. The organizational structure is constantly shifting as people come in and out of the company, and the job requirements change with the individual's strengths and weaknesses. One production manager (PM) will have a whole different set of needs regarding their TD than another. While TDs are typically stereotyped as rigid professionals that deal in concrete details, the truly successful in our line of work are flexible individuals that actually relish in changing to make things function smoother.

This fluid relationship that we have with our job description can best be illustrated by how one might employ their assistant technical directors (ATDs). Should you hire an assistant who is a crack shot at drafting, who enjoys it and is highly

proficient in AutoCAD, then you would obviously use them for that purpose and offload as much of the construction drafting as possible to them. This gives them the type of work they enjoy and uses them to the best of their capabilities. Meanwhile you focus on the day-to-day operations of the scene shop, scheduling, tracking, and putting together estimate packages. On the flip side, if your assistant is just an all around great person and strong leader, then you would use your assistant and his or her skills with communication and likeability to run the shop operations and interact with the staff during the build. You would bear the brunt of the drafting so that he or she might best apply his or her skills in that other arena. You cannot force a bad draftsperson to draft better, and you cannot make a wet blanket of an ATD work the floor and motivate the carpenters. Your job as the leader and manager is to look at the personnel resources that you have available and use them in the role that they are most efficient and ready for. As that personnel changes and you get new assistants, you have to be willing to change and adapt the operations to best suit the new variable. It is just what we do as a manager of many.

As you transition between different employers and producing organizations, you again have to be willing to adapt. We have worked for organizations that, by nature of lacking a PM, needed us to step up to the plate and create the overall production calendar for the season. This included working hand in hand with the producers to derive the actual dates of the run. While this falls way outside of the typical job description of the TD, we saw a need and stepped up to bat. We were the ones within the organization who had a vision wide enough to organize a season because we do it so well with the builds. We were the ones with calendar building and managing skills who could reference prior seasons schedules and work with the production departments to transcribe what they needed done differently into fresh season calendars with change analysis and comparison data that was easy for all to grasp. Because we could do it for the studio, we knew that we could do it for the organization and reap the multitude of benefits from having that influence and authority to aid the shop and staff.

In some shops the TD is not allowed to touch a tool or material, while in others the TD is a vital part of the scenery construction crew, working alongside of and motivating their crew with their energy and enthusiasm. Sometimes you will have a scene shop manager who keeps the wheels on track for you, and sometimes that responsibility will fall on you. Although Industry-leading organizations like the United States Institute for Theatre Technology (USITT) have worked hard to develop promotion and tenure guidelines for academic TDs and conducted numerous TD job surveys to help define the responsibilities of the job, there is no singular definitive job description for what we do. The generalities of the job are relatively universal among the different organizations that employ TDs, but the specific tasks and scope of management vary

from place to place. You have to be a Jack of all trades who is willing to employ the skills needed by the given organization and let others languish in idle because it is someone else's responsibility. Every organization does its business differently and comes with traditions and biases. It is up to you to analyze the organization and adapt your skill sets to best fit their needs. Find out how things have been done in the past and start there. An effective leader is always making change happen, and over time you will be able to evolve the culture of the organization to function better and suit your needs and strengths as an individual. You have to be able to perceive and discern between what you can change and what is immovable. You cannot come into a new position with your organizational guns a blazing, ready to flip the culture on its head, but on the other side of the coin you cannot come in and expect to keep up business as usual. Adaptation is a two way street that leads to success, but you need to come in not like an avalanche but with the methodical determination of an iceberg.

Responsibilities: One Head, Many Hats

The work of a TD is a many-headed beast. Like the last section posited, it is near to impossible to nail down a full job description for any TD position anywhere in the world. You could be a manager for a road house, an assistant professor at a major state university, in charge of an independent scenic studio producing corporate trade show booths, or a leader of a twenty-person union scene shop for a major regional theatre producing $150,000 sets. In each of these positions the job of the TD is quite different, with a definition equally as illusive.

This book means to focus primarily on a traditional and ideal definition of a theatrical TD who is producing a season of shows. This scenario takes place in countless regional, educational, and summer theatres across the nation and the world. The support staffing and outlying responsibilities vary drastically from place to place, but the guiding principles and base responsibilities remain part of a common core. Our position exists to make dreams happen—to take an artistic vision for a production's scenic design and realize it to its fullest potential. To do that effectively we have to take on ownership and responsibility for that vision. It is our cross to bear, to serve as the bottom line for getting it done safely, on time, and within the constraints of our budget. Our process is what guides us through from page to stage, and we must give appropriate time and attention to each and every step along the way, or we cause chinks in the armor, weak spots where, if the stars do not align, the walls can come crashing down around us. Without proper planning, implementation is futile. To that end, the TD is a project manager.

Project management is a job that holds meaning across a wide variety of

industries. From home construction to advertising, a project manager is someone who has a handle on the steps necessary to properly plan and implement a function of the business they are a part of. It takes extremely strong organizational skills to manage all of the steps along the way, from concept to reality, and being in touch with the nitty-gritty of the implementation is a must. Without having been a carpenter in a scene shop, it is hard to know what is needed to build a set piece. Having not done graphic design and market analysis, one cannot put begin to manage an effective advertising campaign. You have to master a craft before you can effectively charge others with its actuation. Almost all of the successful TDs that we know came up through a traditional master/apprentice learning process. Despite the master of fine arts (MFA) degree on their office wall, they were an intern, carpenter, master carpenter, and ATD for a long time before they became TDs.

As a project manager, you also have to be able to "push paper." Putting together the plan is all theoretical work until the hammers start swinging. Mastering our industry's application of software like Microsoft Excel and Project, AutoCAD, and cloud storage and sharing solutions are a necessity for building calendars, deriving budget and time estimates, creating construction specifications, and keeping the scene shop machine humming instead of stuttering. Using these tools effectively and producing elegant and concise documentation gives you instant credibility with stakeholders, collaborators, and followers. An effective project manager keeps all of this paperwork in order and organized for quick reference. By double checking that they have crossed all of the *t*s and dotted all of the *i*s, they ensure that the process has been followed and the implementation will be a success.

The TD is a leader and a manager. These are two distinct but closely related concepts. The manager rules the roost, keeping the crews on track by ensuring that the materials and hardware are flowing, the necessary tools are ready and working, and the order of the day is being followed. An effective manager supervises their personnel and squares away the logistics of an operation to keep the crews running at an optimal efficiency. Managing personnel means making sure everyone is getting paid and is well trained and equipped for their work. Following through on the planning and groundwork laid out by the project manager, the manager of a scenic studio makes sure that the instructions are followed and that the resources are in place to keep the ship righted and on course. Being able to perceive the bumps along the way and working to abate them is the work of a proactive manager, while being able to improvise and quickly come up with inspired solutions when confronted with a problem is the work of a reactive manager. You must strive to be a healthy blend of the two when managing a scenic studio. An effective manager must also establish authority, respect, and trust with their followers, but a leader realizes that all of these things are a two-way street.

A leader inspires their followers and makes them want to do their very best because they believe that the very best is what their leader is giving of their own self. Sensing the needs of your followers and discreetly catering to them is the function of a leader. Get the crew a water cooler for the break room. They will stay well hydrated during the course of their work day and maintain more productive energy levels—a small investment with a big payoff. Stock the freezer with popsicles. They are refreshing on those hot summer days of the build and give the crew a boost of sugar-induced energy in the afternoon, counteracting the digestion of their lunch that is trying to lull them into inaction. These small gestures mean a lot, both in their face value and unconsciously, demonstrating the investment that you have in those that follow you and their happiness. As the manager, you conduct performance appraisals at regular intervals with the artisans in your charge; a leader takes that time to listen to the employee. Take their thoughts and concerns seriously, and let your attention and empathy make them feel valued, respected, and heard. A leader realizes that they don't know everything about the craft and trusts the craftsman in their charge to teach them and innovate on their own. Leadership boils down to two pure mutual concepts at its core: respect and trust. Management of a scenic studio can be handed to you, while leadership must be built and earned.

A TD is a draftsperson and a scientist. In creating our technical designs we must be a master of material sciences. A working knowledge of statics and the structural properties of materials and construction methodologies is necessary for designing structures that work and function elegantly. Dynamics and an understanding of mechanics are needed to create the stage machinery that makes theatre magic happen safely and dependably. We must have an understanding of graphic standards and cutting-edge computer-assisted modeling and drafting software to specify these well-reasoned designs clearly to help artisans to understand what they are creating.

A TD is a problem solver. Brainstorming your way through new and exciting challenges on a weekly basis, you have to be able to both innovate forward and look backward to tried methodologies in designing solutions. Thinking outside the box but within the realm of reality, the TD must adapt old ways to solve new problems with creative and dynamic solutions. Problem solving has its own process to follow, and the input that a leader can solicit from their followers is vital to the process. You are not alone in problem solving. There is a whole shop full of creative solution makers and your professional network of contemporaries at your beck and call if you nurture those relationships with trust and reciprocity.

The TD is a collaborator. A TD works as part of a collective where everyone plays their part in the realization of a common goal, and he or she must possess great interpersonal and communication skills to do so. Being able to play well with others

and value the work of those whose jobs you don't understand are keys to success in this field. You will never be creating alone in the theatre, so make sure that you put your best face forward and respect all of the players involved and their contribution to the whole. You have to attend and participate in design and production meetings and prove a vital part of the team. Only through your contribution, ownership, and respect will you garner the same from your collaborators.

The TD has to wear many hats. You have to be as comfortable in jeans and an apron as you are in a button up shirt and tie, at home in the shop, in front of your computer in your office, or in the board room reporting your progress and success. We find solitude and the quiet of drafting as rewarding as the frenzy of the load-in week in the theatre. We harness the scientific to realize the artistic. We plan to fret and to embrace the chaos. Pragmatism and analytic behaviors clash with our creative impulses and artistic drive all day long in the battle grounds of our psyche. The TD is a dynamic and powerful individual who exercises empathy and inspires hope and respect. We are a walking multitool.

Juggling the Season

The job descriptions for most TDs in the theatre business fall within the wide net that we are casting with this text. These TDs function within the context of a season. The shows that they are building for follow in a preordained succession, typically laid out by the producers and PM. This marching order should be spaced out and scheduled equitably to allow for proper design and preproduction work to happen before their realization. Sometimes they are seasonal in nature, spanning the run of a summer or school year, and sometimes the only thing that defines one season from the next is the turn of the fiscal year. No matter which of these season models you find yourself working within, your job as a TD is to keep in your sights the season as a whole. While most members of a design team focus on only one production at any one producing organization, a TD is responsible for each and every one of them within the season. As the productions within a season roll on, the TD quickly learns to juggle. Like someone having running chainsaws thrown at them, to survive the TD must keep all of the balls moving and in the air.

At any one time you can easily have upward of six or seven shows in some stage of the technical direction process. The following scenario can very easily be true. Show 1 can be up and running, hopefully in a self-sufficient place. You still have to be monitoring the run of the show for notes and repairs while planning out the strike and completing the accounting for the build. If you are in a multistage facility, Show 2 can be in technical rehearsals at the same time, pulling you out of the shop and into the

dark comfort of the theatre for long hours both day and night. Shows 3 and 4 could both be in the shop at the same time. Show 3 will be nearing the end of its build and being staged for load in as soon as Show 2 strikes, while Show 4 is in the infancy of its build, just starting to come to life. Show 5 will be in preproduction, requiring you to be drafting, scheduling, and ordering the materials, all laying the ground work for a build to start as soon as Show 3 leaves the shop. Shows 6 and 7 are lurking in different parts of design, with Show 6 in the process of estimation and design revision while creative conversations are just beginning for Show 7. Don't forget that somewhere in the mix you will also be trying to carve out time for routine maintenance and repair in both the theatre spaces and the shop facilities.

Dizzy yet? That can happen watching all of those balls go round and round as you struggle to keep them in the air. The point we are trying to illustrate is that a TD has to be a master of multitasking and time management. None of these projects can idle and succeed. Each requires active participation on the part of the TD. The real skill comes in balancing the needs of each project without working 80 hours a week and going crazy. You have to stay in touch with each project's needs and dole out your time each day accordingly. Obviously things like actively supervising builds in the scene shop require a large bulk of hours, but you can parcel out some of that responsibility to your ATDs, shop supervisor/manager, and master carpenters. They have to be ready for and held responsible for this duty, and in this way the TD can free up office time to manage the other projects. Assistants can be used extensively on preproduction projects like ordering and drafting, but all of this sharing of responsibilities still requires engagement and active supervision on the part of the TD. Stage carpenters as part of the run crew can be enlisted to manage the minor work notes arising from the run of a show. It is best to take personal responsibility for technical rehearsals, production meetings, and design conferences. As the TD, you serve as the head and face of the scenery production area, and in these situations, when all of the major players are at the table, you need to be there to represent your followers and to own the process. You are the best at putting together the estimate packages for design approval, you are the one who can make major decisions during technical rehearsals, and you are the one who should be reporting progress and negotiating during the production meetings.

It is a wild and wooly job, and sometimes the amount of active projects can feel overwhelming. TDs have to be organized and able to manage a personal to do list and daily agenda religiously, constantly assessing and adjusting where each project stands. Juggling is the best analogy for this division of our attentions, and just like juggling, the only way to get better is to practice. College, no matter your major, is the best prep for this type of work. Take on six courses for an eighteen-credit-hour load, hold down a part-time job, and try to maintain a semi-active social life. If you can do this and pass all of your classes with the highest marks while still sleeping at night, then you are

well on your way to being an effective multitasker. College taught us how to look at the needs of every class and situation, distill the essential actions from the ancillary, and dole out time accordingly to satisfy the needs of every calling. This set of skills is the beginning of the toolkit you will need to be a successful TD, family member, and human being.

As an addendum to the summary of this juggling act, we are firm believers in the 40-hour work week. Ok, sometimes it will push a bit more than that if there is a production in technical rehearsals, but as a rule we wholeheartedly believe in a work–life balance. Many persons in this world define themselves by what they do for a living; we are what we do, but without a life outside of the shop and theatre, there is no love in the theatre. You cannot be all consumed by your job. Do you work to live or live to work? The best advice upon entering graduate school for technical production was to leave every two weeks. Go somewhere and do something other than school and theatre. Canoe down a river, hike in the forest, lounge on the beach, shack up in a hotel room in another city, just go. It is too easy to lose yourself in your work, and that is how so many TDs become the burnt out and bitter individuals we are so often stereotyped as. We do what we do because we love it. It is certainly not going to make us either rich or famous, but it is fun, and if you can find work that pays the bills and is honestly fun, then you are on the road to lifelong happiness. However, you have to balance that fun with life, love, family, and friends. Without these things as a foundation, you have no support beneath your career, and before you know it the fun of the work is gone. Work to live, that is the answer, and bless your lucky stars that you have a way to do it that is fun and satisfies your artistic soul.

1.2 Leadership Style: It's the Relationship

We will explore throughout this text the importance of knowledge, training, and planning. Even with a firm grasp on all those things, without strong relationships with our collaborators the success you achieve will be greatly reduced. The unique nature of the performing arts requires interaction with others to create. At every step along the way it will be how you receive and prepare information for others that will set the tone for success. Much of what we as TDs produce comes from a place of facts and figures. Some of our collaborators are looking for those concrete answers about material and safety, for instance, while other arts practitioners work in ideas and concepts that we hope to foster into tangible products. In other instances we combine these in an educational setting with a mandate to teach our collaborators. The more we can understand and connect with the rest of the team's perspective, the more we foster the collaborative process. Our position puts us squarely in the middle as a translator of

sorts. Whether we work in a commercial environment, a not-for-profit model, or teaching institution, the goal is the same: be an effective contributor to the conversation as a member of the process.

Some of the most important collaborators are those we supervise. Much of the discussion we will have throughout this book will describe strategies for leadership of our staff. In Chapter 4 we will discuss the maintenance of our staff's minds and bodies. This section is about the other people we work with. This entire text is a reflection of how we must develop our relationship with the ones we lead and work shoulder to shoulder with every day. Never marginalize them while working to connect with your other constituents. Our success and the accolades we often receive are a result of sweat and toil from our carpenters and craftspeople.

Situational Leadership® is a concept in the study of leadership techniques developed by Paul Hersey and Ken Blanchard and trademarked by the Center for Leadership Studies that we think best governs the interactions and relationships with all those you collaborate with in your organization. Simply put, it says that to be an effective leader and influence others you must realize that every situation and relationship is unique, and therefore they require you to take different approaches as a leader. You must become comfortable in assessing and reading an individual or situation. Try to be aware of different personalities and their readiness for information. Everyone works differently, and being able to know what an individual's unique set of needs and motivations are can help you understand how to supervise or collaborate with them. To best practice situational leadership the TD must remain flexible in their interactions and consciously adjust to who they are working with. This skill is especially vital in a profession as transient as ours, where the relationships and players change with the shifting of the winds. There is always someone new in the mix, and you have to avoid settling into a comfortable rut that has always "worked best."

The "Creative" Team

You will often hear this term as it relates to the individuals who determine the artistic approach to a project. Our primary contact in the creative process is usually the scenic designer. This is almost always the case in theatrical or operatic works. In film it might be the production designer, or in dance you may get more information directly from the choreographer. TDs are responsible for the technical design, how to build it, we are usually not responsible for the aesthetics of the scenery. There are instances where the TD and scenic designer are combined, and if that is your case, it is a challenge that you must personally assess. While the skill sets overlap and often complement each other, it is often more than one person can handle. It is also our belief that separating these

components of the team leads to the best product.

Whoever your primary contact is, this relationship must have a sound foundation in trust and reliability. These collaborators become our partners. We rely on one another to help establish what is possible and how it will ultimately serve both the institution and the concept of the artistic endeavor. As TDs we are responsible to our PM or artistic director to stay on budget and protect the producing entity from property damage and onstage dangers. The scenic designer is working to create physical space that supports the director's approach to the piece. We often find that through the almost inevitable negotiation of resources we must plead our collaborator's case to those we answer to. Having a stake in the creative process and a relationship with the designer can help solve many of the complicated issues that can arise. Being part of the design process also help us to make informed suggestions about minor adjustments to the design, like changes in molding profiles, that can save vital resources on a production.

Along with being an advocate for one another, being accountable for deliverables is of utmost importance. Delivering on what you say you will cannot be underrated. Often we find ourselves up against changes or conditions we may not have envisioned during the planning process. Being truthful about what is possible, and conveying quickly when it appears that things are going off track to the designer, will help maintain your relationship, even if the scenery is not all they had originally hoped for.

Delivering bad news is very difficult. When moving through the design process, we are tasked with evaluating someone's work and then putting a value on it. This is stressful for us and can be demoralizing for the designer. When the price tag exceeds the resources, a critical juncture has been reached. Proceed with caution and clarity. Do not "sugar coat it," but as you explain the costs, give reasons why you chose a material or assumed a certain construction process. This will give insight into your process, and you may find out you had the wrong impression about an element. Avoid the knee-jerk "That'll never work" moment, especially in public. Evaluate and ask questions, and reserve judgment and estimations until you have a chance to look things over alone or one on one with the designer. If there is a way to get a glimpse at an idea before it is presented to a larger group, you may save the designer and yourself a lot of work and heartache.

One of the greatest strains between a TD and scenic designer are missed deadlines. This often puts a dark cloud over the relationship and can very quickly leave a bad taste in everyone's mouth. Assume the best of people. Yes it sounds naïve, but if the designer misses a deadline, try to help them. It is self-preservation. If they cannot get you information, you cannot build the show. We can attest that not having a set

finished on opening is one of the most painful experiences of our lives, and they won't be looking at the designer when that happens. Never be afraid to ask if there is partial information available or could they have a phone conversation even if a model or drafting isn't available. We encourage you to keep your PM in the loop on missed deadlines, but do not parade them around. It will only deteriorate the fragile process that has just begun.

Once the design is established and approved and the build commences, the interaction is more straightforward. Stay in contact and encourage visits or photo evidence of progress. The exception to this is change. We can assure you that changes in the design will occur. If you have planned the best you can, you will often be able to accommodate some changes and even adds. Work with the designer to make these happen. Do not alienate them from the process. If a director comes straight to you, get the designer involved. Again this reinforces trust, and ultimately the design is their creative work and should not be changed without input. When you are unable to meet a request, do not be afraid to communicate it. Consider how you might partially fulfill the request, and offer suggestions that still support the concept and vision of the production. Discuss these things in the same fashion as you did with the initial design. You might just help in synthesizing a better solution for the production when all is said and done.

The Production Manager

The PM is likely your direct supervisor and may or may not come from a similar background. They may be former TDs, stage managers, or scenic, lighting, and costume designers. Like with the job of scenic designer, this may also be a part of your job responsibilities, and like being a TD/designer, being a TD/PM can be a lot of work for one person. As the individual overseeing all aspects of production, the PM has many concerns, and you only represent one piece of the pie. Communicating clearly and with concrete examples and informed choices will help the PM help you. Your manager, like you, receives a multitude of information from many sources. If a production is going south, they get a lot of negativity. While having the ability to complain is part of the relationship, having solutions or suggestions to help overcome a challenge will be more useful and put you in a better place. Come prepared with options to discuss.

Face time with the PM is important, but often hard to come by. Having regular meetings with them is one way to resolve this. It is a chance for you to share the status of shows and get some feedback from their perspective. Come with an agenda with concise bullet points for you to discuss. Always be conscious of others' time and use it with care. Also bring the PM along with you to look at problems in the shop or facility. They are often in meetings or tied to a desk. Most love a chance to take a walk and see

the production come to life. It also gives a chance for them to understand your process and how you view your job. The PM can be your number one advocate and will always have a say in the resources your department receives. Make sure they know what you do and how important it is.

Finally establishing and protecting trust and respect with your supervisor is at the heart of our job. Our job satisfaction is as much about that relationship as is any other part. It is good to remember that when we have discussions with those that report to us. Many discussions with our PM are of a sensitive nature. Being discreet about sensitive information is not only important for trust, but potentially a legal issue. Keep them informed about potential issues as well. No one likes to be blindsided.

Production Department Heads

Designers come and go from project to project; PMs are your boss, but no one understands the particular challenges of producing for your organization like other department heads. People like the prop master, electrics supervisor, and costume shop manager may produce different elements, but they work on the same shows for the same company. Not every entertainment producer has all these components, but often there are discussions between these parties about who does what or when an item moves from one shop to another.

The scenic charge, for instance, is always a part of how we build scenery. Most times they are the last one to touch a scenic element, making any nasty carpentry look amazing or highlighting that seam right through the middle of the thirty-foot wall. Keep them in the loop. Do not choose materials without consulting them. Help them out by making sure that the scenic designer understands that the design package includes paint elevations, not just drafting. Work out how scenic elements will move from your shop to theirs, or protect the space and time they need in the theatre. Meet regularly and admit immediately when a mistake or scheduling set back occurs. The scenic artists are allies and partners in producing the work. Have respect for their work and their process. If you find yourself managing the paint shop, trust in your scenic artists and try to see it from their perspective. You may have to tell them to stop painting on a project as time has run out because it's difficult to stop trying to make something perfect, but if you have developed mutual appreciation and protected their work, they will trust you.

The other department heads will be your allies, especially when all the items come together in the space. Before that happens, keeping an eye out for items in your design that might be an issue for their department will strengthen your relationships. There is a ceiling, so coordinate your department's work with electrics so you can figure

out how to focus efficiently. A feasible example of a multidepartment project can be a chandelier. Props might build it, we will hang it, lights will turn it on. If the flooring is bar grating or covered in a rough texture, work with costumes to abate the chances of long and flowing items being damaged or caught by the rough floor, or heels that will slip through the grating. Looking out for one another and having a conversation about trouble spots before they become an issue will make everyone's experience better. If the production heads are on the same page, discussing solutions with the creative team will be more effective and probably received better. This also improves your relationship with the PM, who does not need to play mediator on everything. Still feel free to use the PM when there is an unresolved issue between departments.

Collegial

Maintaining healthy professional relationships outside of the workplace is also very important to your career as a TD. Specialists and other TDs are valuable resources for getting help with problems and brainstorming. Online venues like TD forum at http://techdirector.bigforumpro. com and the Stagecraft Mailing List are important conversations to play an active role in, and the professional members there can help you solve challenges that you become stuck on. Membership in, active service with, and the conferences of professional organizations like USITT and PLASA also serve as regular opportunities to touch base and maintain collegial relationships with other practicing contemporaries.

You never know when you will need to tap these contacts to help you stay afloat in a production setting. We have many times looked to overhire skilled TDs as specialists for production challenges. The value of having someone with the same skills and vocabulary as you for intense applications like the design and build of a hydraulic stage lift cannot be understated. You have to work to maintain these professional connections to other TDs, but it is this idea and talent pool that you can turn to when help is most needed. There was once a set sent on the road for an out of state performance, and we did not have the time in the schedule to go with it. We were able to fish within the pool of professional contacts and come up with two skilled contemporaries whose work we were familiar with to fit the bill. We were able to gain peace of mind in the project and help them find that little bit of profitable side work quickly and easily.

This is a small, small industry, and you have to work to build and maintain positive relationships with everyone you encounter. You never know who will be in the position to offer a reference or make sure a job opportunity is on your radar. In the education game it is equally important to maintain these relationships to help place your students into jobs after they graduate. In the end these relationships are just as

valuable as the skills in your toolkit.

1.3 *Veritas*: The Proof is in the Pudding

All of our work as a TD is grounded in getting others to trust and follow you. This trust can only be forged in the fires of honesty, integrity, and truthfulness. Every decision that we make must come from proven research and honest reporting. *Veritas*, the goddess of truth, is said to lie at the bottom of a well and be elusive (Wikipedia, *Veritas*). You may ask then, as Pilate did, "What is Truth?" (John 38:18, KJV). Plato might say it lies in the "Ideal" form, or Aristotle might argue that only through systematic empirical observation could we determine such a thing (Herman, Arthur, *The Cave and the Light: Plato Versus Aristotle, and the Struggle for the Soul of Western Civilization*). We fear the answer does not lie within this book, but we can share how we believe it applies to technical direction. Simply, our charge is to be truthful in the dispensing of our duties.

What do we mean by that? It means, to the best of your ability to accurately convey your findings and opinions. The entertainment business is a tiny one. It will not take long before you will be 6 degrees of separation from just about everyone in the "Business," including Kevin Bacon. Your words and deeds will follow you. A good name is easy to lose and hard to rebuild.

Functionally, being truthful can be very challenging, not because "telling the truth" is so hard, but because knowing what is true can be. From the onset of your process with a creative team you will be asked to create hypothetical estimates based off not-to-scale napkin sketches. The words will fly through your head, "What am I supposed to do with that?" and "Are they kidding?" You are supposed to build it, and yes, they are absolutely serious. Now reach down to your experiences and the things you have a solid grasp on, like material costs, strength of materials, physics, your labor pool, etc., and convey what you think to the best of your knowledge. Trust us when we say you will not always know. That is ok too. Say you are not exactly sure, but you will work on it and get back to them. Be careful of jumping to an answer without thoughtful deliberation. This will help you avoid getting stuck with an idea if it isn't going to work. Even if you are sure about an idea, it doesn't mean it can't change. Afford yourself the same chance to create as the other members of the team. Creation often requires destruction.

Do not misrepresent your estimate. You are the expert on why you chose what you did. Be prepared to explain those choices. Yes, sometimes you will pad your numbers. Why? Because you are uncertain, and that is ok. It has been our experience that representing contingency sums that way is acceptable as long as it comes with an explanation. And yes, we tend not to share every bit of our formula, but it's there if more

information is needed. We give the overview to give a big picture. Details can come later.

Be truthful in your investigation of an estimate. Look closely at how long or how much material it will take to do something. You owe it to your staff and yourself to fully engage and own the project. You might get crunched for time or feel like you have seen the same type of thing before and overuse the shortcuts we will talk about in the next chapters. Being thorough and honest will save you later. Investing time in the planning stages will pay huge dividends in the end. This becomes unbelievably hard when you get to that last 10 percent overage. A set 100 percent over often seems easier than one that is close. One reason it's difficult is because you might be inclined to say, "I'll just figure it out later." Not only have you planned on an overage, but you haven't given yourself the margin you need to combat any unforeseen challenges. This lets everyone but you off the hook. You will pay for it in the end, both financially and with your credibility.

You may find yourself in a frustrating situation where you are asked to do things above and beyond the original design or those notes that never seem to end. It can be draining, especially after two straight ten out of twelves and four hours of sleep, but that's when you have to dig deep and remember what made you want to do this in the first place. Avoid reacting in the moment with emotion. Say to them nicely, "I will work on that and get back to you."

Be honest about your abilities. If you don't know, say so. Often we are expected to be a master of all things technical, but most of the time we are a Jack of many trades but a master of few and not the one we need at that moment. Technical design is a creative process, and like any creative process you can get stumped. You may never have seen or heard of anything like what is being designed. Look for help. In this text we are going to talk you through a ton of places to find that help. It is out there, and your colleagues love to tell their stories and share their solutions. On the job training is the name of the game. While our educations will be eye-opening and an incredible foundation, you have to be able to continue to learn and change. Continually look to fill the gaps in your knowledge. Learning a new way or another way may not always be the right way at the time, but it will teach you something for use down the line.

After all of this, sometimes you will think you have it figured out, but you don't. If you screw up, own up to it. You will screw up. That's not the point. The point is to take ownership and move on to finding a solution. Finding solutions is our thing. It's what we excel at. We can overcome these obstacles and move on.

Remember to afford and expect the same of others. Help foster a place of accountability and honesty, but also make it a place where mistakes and growth are

embraced not attacked with punitive engagement. No one wants to be put on the spot or have their weaknesses and errors exposed.

Find your way to truth, and let it guide your work.

1.4 Problem Solving: More than One Way to Skin a Flat

At our core, we are problem solvers, or, as we rather call it, solution makers who take on creative challenges headfirst on a regular basis. We use the sciences, the familiar, and our communities to best fulfill the needs of every production we build a set for. Very rarely do you find yourself producing something completely familiar. Problem solving, like technical design, is a process. Divine inspiration rarely strikes, and so we need to respect and have an understanding for how we get to our answers. There is no one right or wrong way to get there, only that you must try to discover a way that works best for you. The process is contingent on your personal style. There are plenty of published strategies for problem solving, such as TIPS, the theory of inventive problem solving, or CPS, the creative problem-solving process. Often these formalized problem-solving processes are aimed at getting otherwise rigid minds thinking outside of the box when searching for solutions. We don't have that problem in our line of work. We live outside of the box. Conversely, we more often need a procedural structure for keeping us on course before we end up turning the box into a sphere.

Our process is just that: ours. It is a framework for making sure that we give every challenge we take on its due attention. We see problem solving as a cyclical process, as shown in Figure 1.1. With no definite beginning and end, the best solved problem is one that is constantly being refined and tuned up for continued success. The first step in this journey is in identifying the problem. Take the time to examine and ruminate on what the true nature of the problem you are solving is. When you peel away the layers of complication, what challenge truly lies at the heart? Oftentimes it is too easy to accept a design or challenge at its face value, to either blindly take it on as presented or even worse to get lost in the detail of it. Research the challenge and find its core. If an actor and scenic unit need to track onstage from the stage right wing and you have done that before, don't just assume you are going to solve it the same way again. What is the desired visual effect? What speed is the travel? What is the artistic reasoning for the effect? What resources do we have at hand that we did not before?

In our work we see students miss test answers simply because they don't read the whole problem. We have seen complex challenges, layered like a head of cabbage, where as a TD we had to wade through a wealth of details just to get down to the root of the problem. Take the time to properly identify and define the challenge before you jump head first into it. Use that definition as a mission statement that guides you and

is present in every choice that you make while working on that problem.

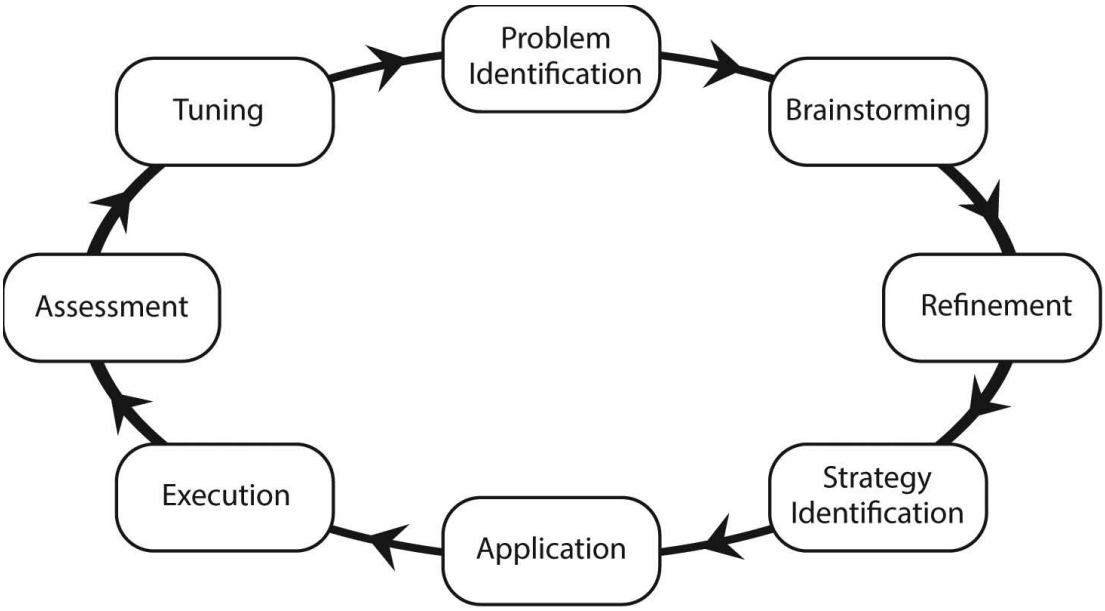


Figure 1.1 The problem-solving process

Next in line, after properly identifying the challenge, is brainstorming. Alone or working as a group, the focus of any brainstorming session should be volume of ideas. When working as a group, like you and your assistants or as the design team, brainstorming must have a leader, someone to guide the conversation and help catalogue the ideas. Certain ground rules must be adhered to for the brainstorming session to be most productive. No criticizing the ideas of others. Even if it was a terrible idea, if you criticize someone for what they contributed, then you are effectively shutting them out of the problem-solving process. Shoot them down once and they will think twice before offering their idea next time. Every time someone is alienated from the process, it is a setback for creativity. Avoid idea loyalty. When working by yourself or in a group, try not to be invested in an idea just because it was yours. Keep an open and non-defensive mind. You might let the best solution go on by while defending your own. It is ok to riff off someone else's ideas during brainstorming. Build upon it, or simply restate it in different terms; there is no ownership at this point, so don't be afraid to pile on. Brainstorm in a neutral environment. Take the conversation to lunch or to a meeting room, but brainstorm where you will not have your flow interrupted. You might think the clearest when driving long distances, letting the brain idle on the monotony of the road has always opened it to run freely on a thought.

Refinement is up to bat next. Once brainstorms have slowed to a light drizzle, it is time to look at what you have got. The group leader should work with the rest of the team to sort out the list. Weed out ideas that just are not valid; group together ideas that are similar in nature. Classify and distill things down until there are just a couple of very viable solutions to move forward with. Don't be afraid to have two or three ideas left to run with. You are not committing to anything yet. If you are working as a group, divide up the remaining potential solutions and let everyone start work on different ideas. Identify your key strategies and commit to flushing them out.

Strategy identification should be the aim of this refinement, and we must begin to mock up our solutions. Research what you determined as your approaches. Make choices and start to analyze their potential for success. One sure fire way of doing this is to mock up and test your solutions. In the marketing world, before embarking on a multimillion dollar advertising campaign, an ad executive would test some ideas out on a focus group. Their reactions and responses would help inform the development of the formal solution. In the same way, we as TDs must test our different solutions before choosing and implementing them. If it is a structural challenge, we will use math to visualize and theoretically test out different ideas. If it is a mechanical problem, we might mock up a test from spare parts or in scale to help visualize the solution's effectiveness. In the end your ideas must always be tested by some means before any other resources are invested in their execution.

If you were working on testing multiple solutions, then this type of empirical comparison should serve as a means for choosing one solution that appears to be the most effective. Use the quantifiable results of testing not only to choose between ideas but also to refine them. Take what you learn from their testing and use the results to improve upon them before implementation. Never implement an untested idea. Leave yourself plenty of wiggle room to test and refine before the due date arrives.

Application is the creation of a realized solution leading up to the "opening night" of the challenge. If we again compare ourselves to advertising executives, this would be the final markup leading to the roll out of our campaign. For us this culminates in opening night. Having identified our strategy, our shop now has to apply it, building whatever hare-brained solution we have come up with. Test it, build it, and load it in, it is now show time. Plan and schedule to have your solution ready to roll weeks before it is due. Something always comes up, and you need to have a buffer built into your process to compensate. If nothing happens, you can relax and take your time, but trust us, something always eats into that contingency. Once prepared for it, we punctuate the application with formal implementation, or the execution of the solution, opening night.

We did it; we came up with a viable solution and saw it through to the stage.

Whether that problem solving is for a particular unit or even your technical design process as a whole, you are not done. To be most effective as a problem solver you need to establish guidelines and expectations that you can use to quantify the success of your solution. To turn to advertising again, this would be measuring the market response to the implemented campaign. For us it is, how did that lift work out? Was our process smooth and on target? Whatever we have solved for, we need to set up guidelines and timelines for assessment post implementation. Only through this honest and regular assessment can we judge and improve our problem solving. Use the feedback from your carpenters and the post mortems to judge and fine tune your collaborative process. Use the checklists and regular inspections to judge the durability of a technical solution. A great problem solver takes that feedback and adjusts the ongoing solution. We adapt our process to fit the organization. We change out components to improve machine performance and reliability. We have to take our assessment and turn it into viable fine-tunings of our solution. Finally, when things have been assessed and tuned for performance, it never hurts to go back to that initial conversation—the genesis of the challenge. We should periodically reexamine the question or the root of the problem and judge whether our solution truly addresses it or if we veered off course. The answer to this elementary question decides where we go in the process next.