



OFF THE RAILS (2017); ENSEMBLE. PHOTO: JENNY GRAHAM



*Cynthia Rider*  
Cynthia Rider  
Executive Director



*Bill Rauch*  
Bill Rauch  
Artistic Director

2017 was a landmark season. We staged four new plays by writers of color—*Mojada: A Medea in Los Angeles* by Luis Alfaro; *Hannah and the Dread Gazebo* by Jiehae Park; *UniSon* by our resident ensemble UNIVERSES, based on the poetry of August Wilson, and *Off the Rails* by Randy Reinholz, the first Native American-written play OSF has ever produced.

Our Canon in a Decade journey continued with a visceral *Julius Caesar* in the Angus Bowmer Theatre. *Caesar* was followed by a repertory-within-the-repertory comprised of the histories *Henry IV, Part One* and *Henry IV, Part Two* at the Thomas Theatre, and the 1980s pop-infused *The Merry Wives of Windsor* outdoors. *Shakespeare in Love* delighted audiences in the Bowmer, while Disney's *Beauty and the Beast* and Mary Zimmerman's *The Odyssey* took audiences on magical, epic adventures in the Allen Elizabethan Theatre.

Three Play on! commissions received performance readings: *The Two Noble Kinsmen* at the University of Utah, *The Tempest* at the Alabama Shakespeare Festival and *Julius Caesar* at Ashland High School. In August, we celebrated the 30th annual Daedalus Project, which has been raising funds to support services for persons with HIV and AIDS and to HIV/AIDS public education programs since 1988. All in all, the 2017 Project grossed \$121,706.

Our Access for All campaign completed its second phase in June. The remodeled courtyard features new bricks, handrails, stairs and a six-fold increase in seating to make it easier for people to gather before shows and watch performances on our new Green Show stage. The campaign concluded in December when accessible seating and companion seating were added in the Angus Bowmer Theatre.

During the summer, wildfire smoke forced some outdoor cancellations. Three shows were converted to popular concert readings, while the Box Office staff helped many other ticket holders find seats at other productions. The company rose to the occasion by focusing on solutions, getting the word out and taking care of our audiences and each other.

In December, we lost longtime company member G. Valmont Thomas. One man plays different parts in his lifetime: G. Val was an actor, a teacher, a mentor and an inspiration to many. We dedicate the 2018 season to him.

Plays and productions originating at OSF continue to generate notice and appear on other stages, including three American Revolutions commissions: *Sweat* by Lynn Nottage and *Indecent* by Paula Vogel were each nominated for three Tony Awards, with *Indecent* winning Best Direction and Best Lighting of a Play. BroadwayHD filmed the show for PBS Great Performances. OSF will produce *Indecent* in 2019. Lisa Loomer's *Roe* received The PEN Center USA 2017 Literary Award for Drama. In December, *The New York Times* announced that *Head Over Heels*—which had its world premiere on the Allen Elizabethan stage in 2015—will head to Broadway via San Francisco's Curran Theater this spring and summer.

Our eleven-production season played a total of 803 performances, closing at 82% of capacity with a total attendance of 381,378.

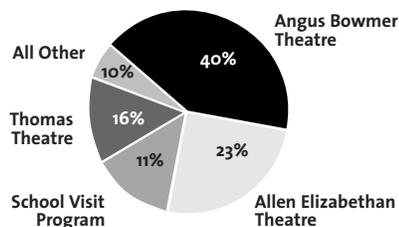
Our audience is vital to our success. We'd never grow and accomplish as much as we have without your enduring support and enthusiasm. Together, we have made OSF what it is and what it strives to be. We are indeed fortunate in our friends—past, present and future.

## Statement of Financial Position

	As of October 31, 2017	As of October 31, 2016
<b>Assets</b>		
Current assets:		
Cash and cash equivalents	\$ 490,538	\$ 861,794
Investments	966,932	2,702,651
Accounts receivable	209,306	224,785
Pledges receivable, net	4,612,932	4,144,166
Due from Endowment Fund	2,485,000	2,028,948
Prepaid expenses	1,738,099	1,458,655
Inventory	135,389	153,031
Total current assets	10,638,196	11,574,030
Noncurrent pledges receivable, net	1,738,653	2,875,817
Property and equipment, net	36,216,149	35,548,118
Endowment Fund	37,787,412	35,385,002
Total Assets	\$ 86,380,410	\$ 85,382,967
<b>Liabilities and Net Assets</b>		
Current liabilities:		
Line of credit	\$ 1,000,000	\$ 700,000
Accounts payable and accrued expenses	3,698,162	2,520,579
Due to Endowment Fund	1,407,502	1,026,591
Deferred revenue, tickets	572,135	371,127
Deferred revenue, program and other revenues	807,243	1,078,786
Current portion of long-term debt	313,611	301,386
Total current liabilities	7,798,653	5,998,469
Long-term debt, less current portion	6,614,701	6,928,084
Total Liabilities	\$ 14,413,354	\$ 12,926,553
Net Assets:		
Unrestricted	\$ 40,646,219	\$ 39,112,847
Temporarily restricted	13,826,933	16,230,207
Permanently restricted	17,493,904	17,113,360
Total net assets	71,967,056	72,456,414
Total Liabilities and Net Assets	\$ 86,380,410	\$ 85,382,967

The annual financial statements for the Festival Association and the Endowment Fund have been audited and a clean opinion has been issued. The audit report is available upon request.

### Attendance Analysis



### 2017 Attendance: Play by Play

	Number of Performances	Attendance	Percent of Capacity
<b>Angus Bowmer Theatre</b>			
<i>Julius Caesar</i>	116	53,018	77%
<i>Shakespeare in Love</i>	122	65,569	88%
<i>Mojada: A Medea in Los Angeles</i>	44	21,947	79%
<i>UniSon</i>	71	30,051	67%
<i>Off the Rails</i>	37	22,823	99%
<b>Allen Elizabethan Theatre</b>			
<i>The Merry Wives of Windsor</i>	38	33,869	76%
<i>The Odyssey</i>	38	36,677	82%
<i>Disney's Beauty and the Beast</i>	38	39,658	90%
<b>Thomas Theatre</b>			
<i>Henry IV, Part One</i>	140	34,510	71%
<i>Hannah and the Dread Gazebo</i>	112	28,338	95%
<i>Henry IV, Part Two</i>	47	14,918	93%
Totals	803	381,378	82%

# Statement of Activities

	For the year ended October 31, 2017				For the year ended October 31, 2016			
	Unrestricted	Temporarily Restricted	Permanently Restricted	Total	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
<b>Operating revenue:</b>								
Plays	\$ 21,811,185	\$ -	\$ -	\$ 21,811,185	\$ 22,112,375	\$ -	\$ -	\$ 22,112,375
Other events	354,355	-	-	354,355	374,356	-	-	374,356
Educational programs	319,195	-	-	319,195	338,144	-	-	338,144
Publications	272,669	-	-	272,669	282,494	-	-	282,494
Concessions	522,335	-	-	522,335	485,058	-	-	485,058
Investment income (loss)	3,847	5,440	-	9,287	(22,332)	-	-	(22,332)
Support from Endowment Fund	1,380,976	231,838	-	1,612,814	1,414,697	-	-	1,414,697
Insurance recoveries	712,500	-	-	712,500	-	-	-	-
Other	558,241	-	-	558,241	589,088	-	-	589,088
<b>Total operating revenue</b>	<b>25,935,303</b>	<b>237,278</b>	<b>-</b>	<b>26,172,581</b>	<b>25,573,880</b>	<b>-</b>	<b>-</b>	<b>25,573,880</b>
<b>Support</b>								
Memberships	4,777,491	-	-	4,777,491	4,226,175	-	-	4,226,175
Gifts and grants	3,147,557	3,253,124	-	6,400,681	3,161,086	4,100,852	-	7,261,938
Support groups	90,133	-	-	90,133	98,535	-	-	98,535
Net assets released from restrictions:								
Satisfaction of time and purpose restrictions	5,631,351	(5,631,351)	-	-	3,651,665	(3,651,665)	-	-
<b>Total support</b>	<b>13,646,532</b>	<b>(2,378,227)</b>	<b>-</b>	<b>11,268,305</b>	<b>11,137,461</b>	<b>449,187</b>	<b>-</b>	<b>11,586,648</b>
<b>Total operating revenue and support</b>	<b>39,581,835</b>	<b>(2,140,949)</b>	<b>-</b>	<b>37,440,886</b>	<b>36,711,341</b>	<b>449,187</b>	<b>-</b>	<b>37,160,528</b>
<b>Operating expenses:</b>								
Plays and education	28,632,285	-	-	28,632,285	26,031,039	-	-	26,031,039
Marketing and audience services	4,870,422	-	-	4,870,422	4,783,261	-	-	4,783,261
General and administration	4,631,176	-	-	4,631,176	4,346,220	-	-	4,346,220
Membership and fundraising	2,116,849	-	-	2,116,849	1,882,213	-	-	1,882,213
<b>Total operating expenses</b>	<b>40,250,732</b>	<b>-</b>	<b>-</b>	<b>40,250,732</b>	<b>37,042,733</b>	<b>-</b>	<b>-</b>	<b>37,042,733</b>
<b>Income (loss) from current endeavors</b>	<b>(668,897)</b>	<b>(2,140,949)</b>	<b>-</b>	<b>(2,809,846)</b>	<b>(331,392)</b>	<b>449,187</b>	<b>-</b>	<b>117,795</b>
Other funds and nonoperating activities, net	(42,503)	61,331	-	18,828	-	45,007	-	45,007
Collective bargaining expenses	-	-	-	-	(249,290)	-	-	(249,290)
Depreciation on assets funded by restricted gifts and grants	(974,474)	-	-	(974,474)	(914,282)	-	-	(914,282)
Capital campaign contributions and earnings	-	1,031,300	-	1,031,300	-	1,503,570	-	1,503,570
Capital campaign contributions released from restriction	2,386,164	(2,386,164)	-	-	1,189,420	(1,189,420)	-	-
Capital campaign direct expenses	-	(157,576)	-	(157,576)	-	-	-	-
<b>Endowment activities:</b>								
Endowment Fund contributions	-	10,000	380,544	390,544	-	50,000	5,325,872	5,375,872
Endowment Fund investment income	1,593,798	2,740,390	-	4,334,188	641,298	1,085,298	-	1,726,596
Change in value gift annuities	-	(53,436)	-	(53,436)	-	(85,227)	-	(85,227)
Endowment support to Festival	(677,559)	(1,508,170)	-	(2,185,729)	(657,387)	(1,092,982)	-	(1,750,369)
Endowment expenses	(83,157)	-	-	(83,157)	(79,591)	-	-	(79,591)
<b>Change in net assets</b>	<b>1,533,372</b>	<b>(2,403,274)</b>	<b>380,544</b>	<b>(489,358)</b>	<b>(401,224)</b>	<b>765,433</b>	<b>5,325,872</b>	<b>5,690,081</b>
<b>Net assets:</b>								
Beginning of year	39,112,847	16,230,207	17,113,360	72,456,414	39,514,071	15,464,774	11,787,488	66,766,333
<b>End of year</b>	<b>\$ 40,646,219</b>	<b>\$ 13,826,933</b>	<b>\$ 17,493,904</b>	<b>\$ 71,967,056</b>	<b>\$ 39,112,847</b>	<b>\$ 16,230,207</b>	<b>\$ 17,113,360</b>	<b>\$ 72,456,414</b>

Attendance Comparisons	Number of Performances		Attendance		Percent of Capacity	
	2017	2016	2017	2016	2017	2016
	Angus Bowmer Theatre	390	389	193,408	197,110	81%
Allen Elizabethan Theatre	114	114	110,204	108,382	83%	79%
Thomas Theatre	299	304	77,766	91,812	83%	94%
<b>Totals</b>	<b>803</b>	<b>807</b>	<b>381,378</b>	<b>397,304</b>	<b>82%</b>	<b>85%</b>

School Visit Program	Fall 2017	Fall 2016
Number of Schools Visited	115	120
Number of Events	541	586
Attendance	54,737	65,995

## The 2017 Plays



### ALLEN ELIZABETHAN THEATRE

#### THE MERRY WIVES OF WINDSOR

by William Shakespeare

Directed by Dawn Monique Williams. Scenic designer, Regina Garcia. Costume designer, Ulises Alcalá. Lighting designer, Jennifer Schriever. Composer and sound designer, Paul James Prendergast. Choreographer, Valerie Rachelle.  
*Projection design: Jed and Celia Meese Foundation*  
*Partner: Julie Strasser Dixon and Rocky Dixon*

#### THE ODYSSEY

by Homer

Adapted by Mary Zimmerman from the translation by Robert Fitzgerald.  
Directed by Mary Zimmerman. Scenic designer, Daniel Ostling. Costume designer, Mara Blumenfeld. Lighting designer, T. J. Gerckens. Composer and sound designer, Andre J. Pluess. Projection designer, Shawn Sagady. Choreographer (*Suitors' and Nausicaa's Dances*), Kirstin Hara.  
*Sponsors: The Chautauqua Guild, Yogen and Peggy Dalal, The Goatie Foundation*  
*Partners: Lynne Carmichael, Kelly Bulkeley and Hilary Krane, Kevin and Suzanne Kahn, Trine Sorensen and Michael Jacobson*

#### DISNEY'S BEAUTY AND THE BEAST

Music by Alan Menken

Lyrics by Howard Ashman and Tim Rice

Book by Linda Woolverton

Directed by Eric Tucker. Music direction and arrangements, J. Oconer Navarro. Choreographer, Erika Chong Shuch. Scenic designer, Christopher Acebo. Costume designer, Ana Kuzmanic. Lighting designer, Jennifer Schriever. Sound designer, Joanna Lynne Staub.

*Lead Sponsor: McMurtry Family Foundation*

*Sponsors: Robert Dohmen, The Goatie Foundation*

*Partners: Samuel Dana Dakin and Skye Taplin Dakin, Katie Farewell, Linda Joyce Hodge*

#### GREEN SHOW

Community Producer: Claudia Alick

Assistant Producers: Jess Carr, Cassondra Fetty

Technical Manager: Benajah B. Cobb

*Green Show Partners: Avista, Harry and David, Lithia Auto Stores, The Standard*

*The Oregon Shakespeare Festival's productions of Julius Caesar, Henry IV, Parts One and Two and The Merry Wives of Windsor were part of Shakespeare in American Communities, a national program of the National Endowment for the Arts in partnership with Arts Midwest.*

*Photos by Jenny Graham.*

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



### ANGUS BOWMER THEATRE

#### JULIUS CAESAR

by William Shakespeare

Directed by Shana Cooper. Scenic designer, Sibyl Wickersheimer. Costume designer, Raquel Barreto. Lighting designer, James F. Ingalls. Composer and sound designer, Paul James Prendergast. Choreographer, Erika Chong Shuch.  
*Lead Sponsor: U.S. Bank*  
*Producing Sponsor: The Robert and Star Pepper Foundation*  
*Sponsor: Jim Collier*

#### SHAKESPEARE IN LOVE

Based on the screenplay by Marc Norman and Tom Stoppard  
Adapted for the stage by Lee Hall

#### U.S. PREMIERE

Directed by Christopher Liam Moore. Scenic designer, Rachel Hauck. Costume designer, Susan Tsu. Lighting designer, Xavier Pierce. Composer, David Reiffel. Sound designer, Amadon Jaeger. Video designer, Shawn Duan. Choreographer, Jaclyn Miller. Associate Scenic Designer, Alexander Woodward.  
*Lead Sponsor: Roberta and David Elliott Buffett Fund of the Community Foundation for Monterey County*  
*Sponsors: Brad and Louise Edgerton, Amy and Mort Friedkin*  
*Partners: The Birrell Family, Peter and Jane Carpenter, The Collonge Family, Carole Howard, Jerry and Jeanne Taylor Family Foundation*

#### MOJADA: A MEDEA IN LOS ANGELES

Directed by Juliette Carrillo. Scenic and costume designer, Christopher Acebo. Lighting designer, Lonnie Rafael Alcaraz. Composer and sound designer, David Molina. Video designer, Kaitlyn Pietras.

*Sponsor: The Goatie Foundation*

*Partners: Sid and Karen DeBoer, Claudette and George Paige*

#### UNISON

A new musical by UNIVERSES (Steven Sapp, Mildred Ruiz-Sapp and William Ruiz, a.k.a. Ninja)

Inspired by August Wilson's poetry

In association with Constanza Romero

#### WORLD PREMIERE

Developed and directed by Robert O'Hara. Choreographed by Byron Easley. Scenic designer, Christopher Acebo. Costume designer, Dede M. Ayite. Lighting designer, Alex Jainchill. Video designer, Kaitlyn Pietras. Composers and vocal direction, UNIVERSES with Broken Chord and Toshi Reagon. Sound design, Broken Chord.

*Sponsors: National Endowment for the Arts, Ed McCurtain*

*and Jane Dryden, Betty and Jack Schafer*

*Partners: Cynthia Muss Lawrence, Nancy and Donald de Brier, Karen Easterbrook and Alex Sutton, Anonymous Applegate Donor*

#### OFF THE RAILS

by Randy Reinholz

#### WORLD PREMIERE

Directed by Bill Rauch. Scenic designer, Richard L. Hay. Costume designer, E. B. Brooks. Lighting designer, Christopher Akerlind. Projection designer, Tom Ontiveros. Composer and sound designer, Ed Littlefield. Original music and lyrics, Nick Spear. Music direction, Matt Goodrich and Duane Minard. Choreography and movement, Sarah Lozoff and Duane Minard. Phil Killian Directing Fellow, Olivia Espinosa.  
*Lead Sponsor: Fred W. Fields Fund of the Oregon Community Foundation*

*Producing Sponsor: The Goatie Foundation*

*Partners: Oregon Cultural Trust, Sandy Farewell, Henderson-Sonna Family, Pamela Howard and Thomas Castle, The Jacobs Family in Loving Memory of Lynn, The Teel Family Foundation, Ted Wobber and Linda DeMelis, Jim and Kate Wolf-Pizor, Diane C. Yu and Michael J. Delaney*



### THOMAS THEATRE

#### HENRY IV, PART ONE

by William Shakespeare

Directed by Lileana Blain-Cruz. Scenic designer, Adam Rigg. Costume designer, Dede M. Ayite. Lighting designer, Yi Zhao. Composer and sound designer, Palmer Hefferan.

*Producing Sponsor: The Pigott Family*

*Sponsor: Hitz Foundation*

*Partners: The Dauer Family in Memory of Art Dauer, Wally and Sheila Weisman*

#### HANNAH AND THE DREAD GAZEBO

by Jiehae Park

#### WORLD PREMIERE

Directed by Chay Yew. Scenic designer, Collette Pollard. Costume designer, Sara Ryung Clement. Lighting designer, David Weiner. Composer and sound designer, Obadiah Eaves.

*Producing Sponsor: Helen and Peter Bing*

*Sponsor: Charlotte Lin and Robert P. Porter*

*Partners: Edgerton Foundation New Play Award, The Hobbes Family, Richard and Marian Baldy*

#### HENRY IV, PART TWO

by William Shakespeare

Directed by Carl Cofield. Scenic designer, Adam Rigg. Costume designer, Dede M. Ayite. Lighting designer, Alan C. Edwards. Composer and sound designer, Elisheba Ittoop.

*Sponsor: Hitz Foundation*

*Partners: Flying Pigs Aviation, Ann P. Wyckoff, The Kinsman Foundation*

Season  
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