

# Performing Arts Program Guidelines 2010

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# Metcalf Foundation

The George Cedric Metcalf Charitable Foundation's goal is to enhance the effectiveness of people and organizations working together to help Canadians imagine and build a just, healthy, and creative society.

## **WE FOCUS OUR EFFORTS ON THREE AREAS:**

- sustaining the vibrancy of the professional performing arts,
- ensuring the ecological integrity of our natural and working lands, and
- developing lasting solutions to issues of poverty.

Our work is grounded in the belief that change happens when we share hopeful visions of the future, work and learn collectively, think broadly in pursuit of comprehensive solutions, and take a meaningful role in the decisions that affect our lives.

We believe that non-profit organizations play a critical role as catalysts who animate and facilitate lasting change. They create space for people to connect, communicate, and participate. We are interested in organizations that are deliberately engaging communities in their work and developing new strategies and collaborations.

## **WE TRY TO ENCOURAGE SUCCESS BY:**

- supporting dynamic leadership – celebrating, developing, and strengthening leaders who are contributing to positive change;
- nurturing new ideas and practice – exploring and developing innovative approaches to tackling tough problems and seizing opportunities; and
- fostering integrated thinking – creating opportunities for ongoing dialogue, collaborative learning, and reflection in order to build new knowledge and inform action.

In our work, we aim to be clear, open, reflective, and responsive. We actively seek to learn from our experiences with funded projects and from our ongoing exploration of issues and ideas. We expect our grant-making practices to evolve as we strive to realize the full potential of our commitment and resources.

# Performing Arts Program

The Metcalf Performing Arts Program seeks to strengthen and enhance the effectiveness of people and organizations working to sustain the vibrancy of the professional performing arts.

We believe the arts play a crucial role in helping people imagine and build a just, healthy, and creative society.

Art is a transformative way of learning about ourselves and the world we live in. Artists help us celebrate life. They challenge our assumptions and bear witness to our common humanity. They help us remember the past and explore all the possibilities of the future. The performing arts, in particular, bring people together. Our lives are immeasurably enriched by the shared experience of music, theatre, dance, and opera.

Ontario is graced with a dynamic and diverse professional arts community, which is one of its greatest assets. In the Performing Arts Program, our work reflects three key Foundation strategies: supporting dynamic leadership, nurturing new ideas and practices, and fostering integrated thinking.

Through the Performing Arts Program, the Foundation uses its resources to enable individuals and companies to realize their full potential. By supporting arts organizations as they make strategic decisions about the future, and by strengthening the skills and experience of individuals in arts organizations, the Foundation hopes to make a significant contribution to sustaining a vibrant performing arts community in Ontario.

We expect the program to evolve as we learn from our experience with funded projects and our exploration of emerging ideas. We will maintain flexibility in the program in order to respond to issues and opportunities as they arise over time.

# Strategic Initiatives

Small and mid-sized organizations are essential to the performing arts ecology. They are the primary incubators for the creation of new works. They play a vital role in the development and employment of artists, administrators, and production staff. They are the creators and animators of many public performance spaces, and their energy brings renewal and excitement to communities.

Years of cuts to operating budgets have been hard on these organizations. They are being challenged to respond to a difficult and rapidly changing environment, but they have few resources with which to pursue innovative strategies for change and development.

Our work is grounded in the belief that change happens when we share hopeful visions of the future, work and learn collectively, think broadly in pursuit of comprehensive solutions, and take a meaningful role in the decisions that affect our lives. Through the Strategic Initiatives program, we provide an opportunity for experimentation, innovation, organizational change, and learning. In this program, we are particularly interested in:

- nurturing new ideas and practice – exploring and developing innovative approaches to tackling tough problems and seizing opportunities; and

- fostering integrated thinking – encouraging rigorous and thoughtful analysis and creating opportunities for dialogue and collaborative learning in order to build knowledge and inform action.

The Foundation intends, through this program, to encourage performing arts organizations as they develop creative and ambitious new approaches to their challenges or ideas that advance their work.

This is not an operating funding program. Nor is it a project funding program, as that is traditionally understood. With our support, organizations have an opportunity, over a three-year period, to implement a strategic course of action which would not be possible under normal budgetary circumstances. It is our hope that successfully implemented plans will make organizations stronger and more resilient, productive, and effective in the execution of their creative mandates.

## **WHO IS ELIGIBLE TO APPLY?**

Professional theatre, dance, music, and opera organizations in Toronto, which have been in operation for at least three years, have charitable status, and have operating budgets under \$4 million, are eligible to apply.

The Foundation encourages applications for cooperative initiatives which involve more than one eligible organization.

#### **WHAT ARE THE FUNDING PARAMETERS?**

The Foundation recognizes that the capacity to develop creative, powerful, and ambitious ideas for addressing challenges exists in arts organizations of any size. Consequently, in this funding program, grant eligibility is not tied to the size of an applicant's budget. We invite applicants to request an amount appropriate to the size of their initiative and to their own capacity to realize it. All applicants may request between \$25,000 and \$75,000 per year, for a three-year period, representing a total investment from the Foundation between \$75,000 and \$225,000.

When developing a budget for your proposal, the Foundation suggests that applicants carefully consider the following.

- Traditionally, the Foundation only approves or declines the entire amount of the request. It is not our practice to rescale or partially fund requests made to the program.
- An organization's capacity to undertake the proposed initiative is an important assessment criterion for these applications. Applicants may be subject to an additional review, by the Foundation or its representatives, of their organizational capacity and infrastructure.
- Organizations with ambitious ideas but minimal infrastructure may be well

served to seek out other partners to help fulfill their initiative.

- For larger requests, the Foundation will be particularly rigorous in our assessment of the applicant's plans to prepare for termination of funding at the end of the granting period.
- A Metcalf grant can represent a portion of funding for a larger project. When submitting an application that is dependent on other funders, however, an organization should be prepared to discuss the manner in which the initiative could proceed if other funders decline support for it.
- This program will not contribute to capital or endowment fundraising campaigns.

#### **WHAT IS THE APPLICATION PROCESS?**

The Foundation will review applications for the Strategic Initiatives program twice annually, once in the spring and once in the summer. Prospective applicants are encouraged to contact the Performing Arts Program Director in advance to discuss their proposals. Applying to this program is a two-step process.

##### **Step One – Letters of Interest**

Interested organizations must first submit a letter of interest to the Foundation. This letter should briefly outline the nature of the application the organization wishes to

## Strategic Initiatives (continued)

submit, and why. The letter should not exceed three pages. The Metcalf application cover page must be attached to the front of this letter.

Please provide **one paper copy of the letter (printed double-sided) and submit an electronic version in Word to [mjones@metcalffoundation.com](mailto:mjones@metcalffoundation.com)**. The Metcalf cover page need not be submitted electronically.

Please note that we are unable to consider late or incomplete applications for funding; both hard and electronic copies must be **received at the Foundation** by 5:00 pm on the deadline date.

Foundation staff will review letters of interest, identifying compelling and appropriate proposals for further consideration.

### Step Two – Full Application

Based on the letters of interest, the Foundation will invite organizations to submit full applications. **This is not a guarantee of funding.** Those organizations invited to submit full proposals should develop an application, not to exceed eight pages, containing:

- a concise history of the company, with brief bios of key individuals;
- a summary of the current artistic and financial position of the company;

- the challenges the company faces, or the opportunities it sees, that are relevant to the proposed strategic initiative;
- the strategic course of action the company proposes to take;
- a description of the changes that are expected to occur as a result of the proposed initiative;
- what the company hopes to learn over the three-year period;
- what process the company will use to evaluate its progress toward these learning goals; and
- how the company will prepare for the termination of funding at the end of the granting period.

In addition, applicants must attach:

- a completed Metcalf Foundation budget form;
- their most recent audited financial statements; and
- a list of their Board of Directors with their date of election to the Board.

A separate letter of introduction may be included. Additional printed material, such as annual reports or newsletters, may also be provided for background information.

Please provide **one paper copy of the proposal, budget, and Board list (all printed double-sided) and submit an electronic version of this material in Word and/or Excel to [mjones@metcalffoundation.com](mailto:mjones@metcalffoundation.com)**. The audited statements and any introductory letter or additional printed material are to be submitted only in paper copy; they need not be submitted electronically.

#### **HOW WILL APPLICATIONS BE ASSESSED?**

Applications will be reviewed by the Foundation's Board and staff, assisted by an advisory panel from the arts community. Reviewers will take into account the company's history and track record. They will look for evidence of a rigorous strategic review: a thorough and realistic assessment of the current situation, a compelling vision for the company's future, and a clear description of a well-considered strategic course of action. The proposed course of action should reflect the fact that the Foundation's investment will be short-term.

Reviewers will want to understand the thinking that went into the applicant's strategic planning process regarding what the organization is trying to achieve and why it is important; why the initiative is timely, appropriate, and likely to succeed; and how this investment will make a tangible difference to the development and vitality of the applicant.

We believe these initiatives provide an important opportunity for learning, for grantees as well as the Foundation. Therefore, in our review, we will also consider the degree to which the applicant thoughtfully addresses the question of internal evaluation.

Funding decisions will be made by the Board of the Foundation, and such decisions are final. In 2010, the Foundation will support applicants whose initiatives will be completed by **December 31, 2013**.

#### **HOW WILL WE LEARN FROM OUR WORK?**

Successful applicants will provide annual reports to the Foundation. We also meet with grantees every year, so that we can jointly monitor the progress and results of each strategic initiative.

The Foundation reserves the right to review its ongoing commitments if circumstances arise in the participating companies which indicate the initiative is unlikely to be realized. These circumstances could include failure to undertake activities or to meet goals as described in the proposal; the departure of the artistic or management leadership; an organization's charitable registration or incorporation being suspended, revoked, or annulled; or severe financial difficulties.

# Performing Arts Internships

The performing arts are collaborative and labour intensive. It takes a myriad of highly trained people – artists, producers, administrators, craftspeople, technicians, and facility staff – to make a professional performance possible. The people in performing arts organizations, whether onstage or off, are its most crucial resource. They are creative, committed individuals striving to create and produce in a complex, challenging environment.

Years of cuts to operating budgets have been hard on arts organizations. Many have cut back drastically on assistant and apprentice jobs; this has severely limited access to mentoring, training, and meaningful work experience. Historically, these have been important and effective ways for the sector to nurture and develop its human resources.

The Foundation wants to strengthen the performing arts by supporting training and professional development for artists, administrators, and production staff. Our internship program encourages organizations to reaffirm their commitment to the future by providing formal opportunities for mentoring and training individuals who have recently entered the field. We want to encourage the sharing of the rich experience and specialized knowledge that exists throughout the sector.

The Foundation will support the creation of internship opportunities for administrators, choreographers, composers, conductors, designers, directors, playwrights, and production staff. In this program, the Foundation is particularly interested in assisting individuals who have completed formal training and are in the early stages of their careers.

Through this program, organizations can create productive entry points into the sector. We hope they will also realize opportunities to foster leadership, address transitions within organizations, and respond to skill shortages in critical areas. Individuals who have completed internships should have more knowledge, better skills, broader work experience, and useful contacts – all of which will help them make a stronger professional contribution to the performing arts.

#### **WHO IS ELIGIBLE TO APPLY?**

Professional theatre, dance, music, and opera organizations in the province of Ontario, which have been in operation for at least three years and have charitable status, are eligible to apply. Organizations may apply individually or in partnership with others.

An application can only be submitted by a charitable organization, but interns must be identified in the application. The Foundation wants to understand why the individual you have chosen to train is deserving of this opportunity, and how your organization can help them to meet their professional development goals.

#### **WHAT ARE THE FUNDING PARAMETERS?**

Grants will be made for the intern's salaries and statutory benefits, to a maximum of \$27,500 for a full-time, twelve-month internship; that amount is pro-rated accordingly for internships that are part-time or of shorter duration.

Please note the following restrictions.

- Internships must be a minimum of eight weeks in duration.
- Internships must take place in the province of Ontario.

- Funds granted from this program may only be used for intern's salary and statutory benefits (CPP and EI costs). No other costs, including mentoring costs or fees, external professional development, or administrative overhead, are eligible for this grant.
- Co-op work terms are not eligible for funding.

#### **WHAT IS THE APPLICATION PROCESS?**

The Foundation will review internship applications twice annually, once in the summer and once in the winter. Prospective applicants are encouraged to contact the Performing Arts Program Director in advance to discuss their proposals.

The application material should begin with two letters (maximum one page each), one from the intern and one from the primary mentor.

- The intern's letter should explain their professional development goals, why they wish to work with that specific mentor or organization, and the importance of the internship at this time in their career.
- The mentor's letter should indicate why this specific intern has been selected, why they believe the internship would be a valuable training opportunity, and the possible effects of the internship for the individual or for the sector.

## Performing Arts Internships (continued)

The Foundation wants to hear the individual voice, perspective, and motivation of the intern and mentor in order to understand their passion for this opportunity.

Following the two letters, there may be a maximum of five additional pages of application text, which should include:

- the mandate of the applicant organization;
- a description of the internship proposed;
- a training plan for the position, including any opportunities being provided outside the organization;
- a description of the work experience offered;
- a brief bio of the mentor(s), trainer(s), and/or supervisor(s) for the position;
- a brief bio of the intern; and
- the measures that the company and intern will use to evaluate the progress and effectiveness of the placement.

In addition, applicants must attach:

- a copy of the intern's résumé;
- the Metcalf application cover page;
- two budgets – the expenses and revenues for the proposed internship and the organization's current operating budget; and
- the organization's most recent audited financial statements.

Please provide **one paper copy of the two letters, the application text, and proposal/operating budgets (all printed double-sided) and submit an electronic version of this material in Word and/or Excel to [mjones@metcalffoundation.com](mailto:mjones@metcalffoundation.com)**. The intern's résumé, the Metcalf cover page, and the audited statements need not be submitted electronically.

Please note that we are unable to consider late or incomplete applications for funding; both hard and electronic copies must be **received at the Foundation** by 5:00 pm on the deadline date.

**HOW WILL APPLICATIONS BE ASSESSED?**

Applications will be reviewed by the Foundation's Board and staff, assisted by an advisory panel from the arts community. The Foundation will look favourably on those proposals where intern and organization are well-matched, where there is demonstrated commitment to meaningful career development for interns, and where external professional development opportunities complement the work experience.

Reviewers will want to understand how this investment will make a tangible difference for the intern and the professional development needs of the discipline.

Funding decisions will be made by the Board of the Foundation, and such decisions are final. In 2010, the Foundation will support internships which will be completed by [December 31, 2011](#).

**HOW WILL WE LEARN FROM OUR WORK?**

Successful applicants will provide an interim report (for any project longer than four months) and a final report to the Foundation. These reports, which must include input from both the mentor and the intern, should address such topics as tasks that the intern has undertaken, any changes that have occurred in the workplan, and how the experience is responding to the intern's learning goals. In addition, the final report should include information, if it is known, about the intern's future career plans.

Two group meetings of the interns are arranged each year, so that their experience and insight can be shared with each other and with the Foundation.

The Foundation reserves the right to review its ongoing commitments if circumstances arise which indicate the internship is unlikely to be successful. These circumstances could include failure to undertake activities or to meet goals as described in the proposal; the departure of the mentor or the intern; an organization's charitable registration or incorporation being suspended, revoked, or annulled; or severe financial difficulties within an organization.

# Metcalf Renewal Program

The Metcalf Renewal Program will support exceptional individuals as they do their very best work in nonprofit organizations. We know that people in nonprofit professional roles feel a deep sense of responsibility and a desire to perform their roles well – to do their best work at every stage of their career and to make a substantial lifetime contribution to the sector. Through the Renewal Program, the Foundation will build on its longstanding interest in supporting these leaders by making strategic investments in the professional vitality of people who work in charitable organizations – individually and collectively.

These leaders are catalysts. They cause or accelerate change within organizations and around the issues on which they are engaged, and they attract resources, attention, and support to their work. Without them, we would have fewer creative ideas, less compelling visions of a hopeful future, and fewer innovative responses to the challenges of realizing that future. Much depends on the effectiveness of these professionals, their sense of responsibility, and the depth of their commitment.

Such commitment should not be taken for granted. There is likely to be a time in these people's careers when an infusion of fresh information, exposure to the work of others, or space for reflection will be galvanizing. This is true for people at different stages of their career and playing various roles in their organizations, since leaders are found throughout the charitable sector and not only at the top of hierarchical structures. The Foundation believes that, with a little support and encouragement, such renewal can be exceptionally generative for these individuals, their organizations, and the sector as a whole.

The Metcalf Renewal Program makes significant opportunities for professional renewal accessible to talented individuals with a record of achievement.

[The Metcalf Renewal Program has been designed as a cross-sectoral initiative, and applications are welcomed from leaders at organizations working in the performing arts, environment, and community sectors. Please refer to the Metcalf Renewal Program guidelines, available at the Foundation's website, for application requirements.](#)

# Application Deadlines for 2010

Applications **must be received** by the Foundation as follows:

All dates are 2010 unless indicated.

## STRATEGIC INITIATIVES

	Round One	Round Two
letter of interest	December 14, 2009	April 6
Foundation extends invitation to apply	December 21, 2009	April 12
full application deadline	February 1	May 10
grant notification	April 1	June 28

## PERFORMING ARTS INTERNSHIPS

	Round One	Round Two
application deadline	May 3	October 25
grant notification	June 28	December 13

## METCALF RENEWAL PROGRAM

refer to separate program guidelines for application requirements and deadlines

Prospective applicants are strongly encouraged to contact the Performing Arts Program Director in advance to discuss their proposals.

Please submit your application by mail to:

Metcalfe Foundation  
174 Avenue Road  
Toronto, Ontario M5R 2J1

**and** by e-mail to:

mjones@metcalffoundation.com

# Performing Arts Program

Application Cover Page

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Name of Organization

---

Contact Name

Position

---

Address

---

City

Province

Postal Code

---

Telephone

Fax

---

E-Mail

Website

---

Charitable Registration Number

Organizational Revenue (from last audited statements)

---

Signature

Date

Please complete the appropriate section for the program to which you are applying.

## STRATEGIC INITIATIVES

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Amount Requested

per year

( x 3 = )

over three years

## PERFORMING ARTS INTERNSHIPS

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Amount Requested

Duration of Internship (specify months or weeks)

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Intern Name

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Intern's Home Address

---

City

Province

Postal Code

---

Telephone

E-Mail

This form must be attached to your application.

**METCALF**  
**FOUNDATION**

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