METCALF FOUNDATION PERFORMING ARTS

Creative Strategies Incubator

2017 Program Guidelines

*Metcalf works with Canadians to imagine and build a just, healthy, and creative society. As one of its three primary pillars of action, the Foundation's Performing Arts program achieves these goals by engaging with and supporting a thriving, healthy, and adaptive performing arts environment, which it understands to be a dynamic balance between **art, people,** and **resources**. The Foundation's Performing Arts programs engage directly with, or in the interplay between, these three fundamental elements. Specifically, the CrSI program increases the number of organizations who are able to meet the sum of their ambitions by adopting strategic interventions to adapt to a changing sector and world.*

A vibrant city is measured in great part by the energy and diversity of its performing arts sector. Together, artists and organizations create a fertile ground from which our ambitions and imaginations as citizens are encouraged to grow and deepen.

Despite the fact that the environment remains a challenge for many in the professional performing arts, many companies are inventing rigorous new approaches to developing and producing work, resourcing that work, and connecting with audiences. And while the Foundation believes in supporting a diversity of responses to address complex challenges, it also believes that this work will be more successful if organizations share what they learn and build on each other's solutions. Ultimately, the Foundation believes the outcomes of these explorations are worth sharing in the hope that they will inspire others to affect change.

In this spirit, the Creative Strategies Incubator (CrSI) program strives to improve the Toronto performing arts sector by investing in companies as they explore new strategies, nurture organizational change through innovation, and contribute to shared learning. Over three-years, grantees will implement their initiatives and participate in a learning network. These networks are designed to strengthen the individual initiatives through collaboration while their outcomes and learning are translated externally toward the broader arts sector.

Each year, the CrSI program defines one specific **Focus Issue** that all organizations must apply to through the specificity of their own experience. The 2017 Focus Issue is: **engaging audiences and/or building communities around your work.**

Changes, both minor and substantial, have been made to the program for 2017. These are marked as NEW throughout the body of the guidelines.

Program Description

The CrSI program contains two components: Supported Initiatives and the Learning Network.

Supported Initiatives

- three-year funding for each grantee to implement a **new approach** that addresses the Focus Issue

Learning Network

- facilitated dialogue and sharing between all organizations undertaking Supported Initiatives around the Focus Issue
- opportunities for support from consultants and subject experts
- up to five day-long meetings annually

Companies applying to the CrSI program must be prepared to participate actively in both components of the program. They are also expected to share their experiences and learning with other members of the 2017 cohort and the wider performing arts community.

NEW: We are also announcing the **2018 Focus Issue** at this time: **providing greater opportunities for artistic work to achieve its potential.** Application deadlines and any changes to the 2018 application process will be announced in the fall of 2017.

Funding Limits

In 2017, grants will be made **to a maximum of $75,000 per year**, for a three-year period.

Please note:
- The amount requested does not need to be the same in each year but should reflect the scope of the initiative and the resources needed to effectively carry it out.
- **NEW:** Proposals must be implemented over three years. Applications to this focus issue will not be accepted for proposals that are one or two years in length.

Eligibility

Applicants to this program **must**:
- be professional theatre, dance, music, or opera companies;
- be based in the City of Toronto;
- have a minimum of three years' of organizational/production history;
- have a current, valid charitable registration from the Canada Revenue Agency; and
- **NEW:** not have received a CrSI grant in 2014 or later.

Please note:
- Organizations may apply individually or in partnership with others.
- Applications **may** be considered from companies based in the Greater Toronto Area **with a strong presence**, including annual performances, in the City of Toronto. **NEW:** You **must** consult with the Performing Arts Program Director about eligibility under this criterion prior to submitting a letter of interest.
- For all other questions around eligibility, please contact the Performing Arts Program Director.

Application Deadlines

Deadlines for 2017 are:

NEW	general information session	January 25, 3:00 - 5:00pm
	letters of interest	March 6, 2:00pm **New Time**
	invitations to submit full applications	March 20
NEW	full application webinar	March 28, 11:00am
	full applications	April 24, 2:00pm **New Time**
	learning network interviews	May 15 - 26
	grant notifications	June 23

The Foundation is unable to consider late or incomplete applications for funding. **NEW:** Both the letter of interest and the full application must be submitted electronically and be **received by the date and time indicated above**. No paper copies are required.

Application Requirements – Letter of Interest

In 2017, we will be accepting CrSI applications in response to the following Focus Issue only: **engaging audiences and/or building communities around your work.**
NEW Prospective applicants are highly encouraged to attend the general information session to learn about the program's intentions and how best to position their ambitions at this stage of the process. The session will take place January 25, 3:00 - 5:00pm at the YWCA on 87 Elm Street.

There are **two** components to a letter of interest.
1. Metcalf Foundation cover sheet, and
2. the letter.

1. Metcalf Foundation cover sheet

> Download at http://metcalffoundation.com/downloads/

2. Letter – maximum 3 pages total

> **A. Brief** introduction to the company's work (or companies' work, in the case of a collaborative application)
>
> **B.** Overview of proposed Supported Initiative
> 1. describe your understanding of audience and/or community
> 2. describe a challenge and/or opportunity that you are currently facing with respect to the Focus Issue
> 3. describe the new strategy you are proposing to address the above challenge and/or opportunity
>
> NB. Section B is the most important part of your letter of interest.
>
> **C.** Names and titles of individuals who will be leading the Supported Initiative and who **have committed** to participating in the Learning Network
>
> **D.** Brief overview of the organization's experiences working in collaborative learning environments

Letters of interest are to be submitted in **electronic form only**. Submit **one pdf file** with both components to hdunford@metcalffoundation.com by the date and time listed above. After submitting your letter of interest electronically, you should receive an email confirmation of its receipt. If you do not receive confirmation within three business hours of making your submission, please contact Foundation staff.

Application Requirements – Full Application

Based on the letters of interest, the Foundation will invite organizations to submit full applications to the program. Note that an invitation is not a guarantee of funding. The Foundation will not consider full applications that did not receive an invitation to submit following a letter of interest. Please note that reviewers only see the full application, not the letter of interest. NEW We strongly recommend that those invited to submit a full application attend a webinar on March 28, 2017 at 11am outlining this stage of the process in greater detail.

There are **four** components to a full application:
1. Metcalf Foundation cover sheet,
2. application text,
3. budget form, and
4. attachments.

1. Metcalf Foundation cover sheet

> Download at http://metcalffoundation.com/downloads/

2. Application Text – maximum 8 pages total, with a suggested length for each section as follows (do not start a new page for each section):

> **A.** Brief background information about the company (or companies, in the case of a collaborative application) and the proposed Supported Initiative **2 pages**
> 1. mission and history
> 2. current artistic and financial situation
> 3. describe your understanding of audience and/or community
>
> **B.** Details regarding the proposed Supported Initiative **3 pages**
> 1. an overview of the challenge and/or opportunity that you identified in your letter of interest with respect to the Focus Issue
> 2. a detailed outline of the strategy you are proposing to address the challenge and/or meet the opportunity you identified with respect to the Focus Issue
> 3. a prediction of the anticipated changes/outcomes for the organization, your audiences and/or communities, the sector and personally, if applicable
> 4. a detailed articulation of the metrics you will use to determine the anticipated changes/outcomes
> 5. a statement regarding how the organization will sustain the initiative after the granting period
>
> **C.** Responses to the following questions about the innovation and viability of your proposed initiative **2 pages**
> 1. How will your proposal contribute to your organization's healthy and dynamic balance between revenue generation, audience development, and the creation/presentation of work?
> 2. Why is this new approach well suited to the artistic and management practices and history of your company?
> 3. Who else is doing something similar, and what are the key differences between your proposal and your colleagues' offerings?
> 4. Who are your proposed partners for this initiative? Have you already had conversations with them, or how will you convince them to attend/present/ participate?
> 5. In ten words or less, how will you know that your initiative has been successful?
>
> **D.** Learning Network **1 page**
> 1. The organization's experience working in collaborative learning environments
> 2. Titles and brief biographies of the personnel **who have committed** to participating in the Learning Network

3. Budget Form

> Download at http://metcalffoundation.com/downloads/

4. Attachments – provide for all participants in a collaborative application

A. List of organization's Board of Directors
B. Organization's most recent audited financial statements

Full applications are to be submitted in **electronic form only**. Submit **one pdf file** with all four components to hdunford@metcalffoundation.com by the date and time listed above.

Application Resources

The online version of this document contains active links to each of these resources.
- list of past Creative Strategies Incubator grants (Grants Database)
- stories from current Learning Network participants (Stories from the Inc)

Assessment of Applications

Applications will be reviewed by the Foundation's Board and staff, assisted by an advisory panel from the performing arts community. Funding decisions will be made by the Board of the Foundation and decisions are final.

Reviewers will want to understand how this type of engagement would make a tangible difference to the organization at this particular time, its potential for sectoral impact and the degree to which the applicant is prepared to become a valuable and active participant in the Learning Network. We will assess applications according to the following criteria:
- the company's contribution to the performing arts community;
- the company's knowledge of and experience with the Focus Issue;
- the rigour brought to the development of the proposed Supported Initiative, and the degree to which it is timely, appropriate, and likely to succeed;
- the potential opportunities for learning for the organization, the Learning Network, and the wider performing arts sector;
- the company's capacity to undertake the work; and
- the preparedness of the company's leadership to participate in the Learning Network.

When assessing applications, the Foundation will also consider the composition of the Learning Network, trying to ensure diversity in size and discipline of participating companies and diversity of proposed responses to the Focus Issue. All members of an organization's proposed learning network are required to attend an interview with the Foundation as part of the selection process.