

PERFORMING ARTS PROGRAM

Staging Change: Associate Facilitator Training Initiative

2018 Outline

METCALF FOUNDATION

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

PERFORMING ARTS PROGRAM

Our Performing Arts Program aims to create opportunities for new approaches and shared learning in the performing arts. One measure of the Foundation's success in imagining and building a just, healthy, and creative society is the degree to which it enables the performing arts sector to thrive. Metcalf pursues this ambition through programs that serve the dynamic interplay between **art, people, and resources**. Our funding programs are rooted in our long-standing commitment to advance pragmatic approaches in support of bold visions.

Staging Change Program Description

Launching in 2018, the third iteration of Metcalf's multi-year strategic investment program in the performing arts will build on earlier successes and introduce new approaches to the Foundation's longstanding goal of supporting and building a thriving, healthy, and resilient performing arts environment.

Staging Change will be delivered by Metcalf and [EmcArts](#), an arts-focused non-profit service provider based in New York. Over the last 12 years, EmcArts has developed a unique practice in designing and delivering programs for the arts sector that support efforts by organizations and their leaders to innovate and adapt in the face of persistent and complex challenges.

The *Staging Change* program will support organizations over four stages depending on their interest and suitability to the approach designed and delivered by EmcArts and Metcalf.

The first stage is a series of six half-day **Workshops** for small teams from up to 15 performing arts organizations. During the second stage, consisting of on-site customized **Organizational Coaching**, EmcArts facilitators will work with larger groups of stakeholders in up to 10 organizations to explore potential adaptive responses to an identified complex challenge. The third stage, called **Incubating Innovation**, will support up to five of these organizations to undertake a full year of designing, researching, and publicly prototyping a major organizational innovation that builds on previous work. The fourth and final stage is comprised of two years of **Scaling** grants in order to amplify the emerging strategy and re-inforce an adaptive culture.

Funding for the program will also be staged as follows: \$3,000 (stage one), \$5,000 (stage two), \$25,000 (stage three), and up to \$75,000 in each of two years (stage four). There are three application processes for this program but all organizations interested in participating in *Staging Change* must be accepted into stage one before moving on to the other stages. A second application will determine the cohort for stage two and a third combined application will determine the final cohort for stages three and four.

Associate Facilitator Training Initiative

Staging Change is concerned with building local capacity to navigate complex organizational challenges by thinking and acting adaptively. Alongside the organizational work, *Staging Change* will also invest in individual arts practitioners and consultants to develop their capacity to facilitate adaptive change processes in the latter stages of the program. This aspect of *Staging Change* is called the **Associate Facilitator Training Initiative**.

Metcalf and EmcArts are particularly interested in building the capacity of local arts practitioners and independent consultants whose practices involve organizational development work and who are interested in facilitating processes of adaptive change in response to complex challenges. The Associate Facilitator initiative of *Staging Change* aims to provide useful training in this area. We believe the initiative will not only strengthen the legacy of the program across the arts community but will also open up new and timely opportunities for experienced practitioners and consultants.

The Facilitator's Role in Adaptive Change

While technical consulting abounds in the arts — and the process of guiding strategic planning has become a standard practice for many consultants — facilitating the extended work of adaptive change and building adaptive cultures is a relatively recent branch of consulting activity in the sector.

Traditional consultants bring expertise in a specific area of organizational activity (such as marketing, fundraising, or governance) to support strategies centered on incremental improvement. The process facilitator in adaptive work, however, guides unusually-composed teams away from past practices and known expertise toward designing and testing “next practices” for a potentially transformed future.

To a large extent content-neutral, the effective process facilitator brings high levels of aptitude to managing all the stages of group dynamics as newly-formed teams learn to work together, become open and vulnerable, and embark on difficult journeys of exploration that are necessarily full of conflicting ideas. The skills needed and tools available for this work perhaps resemble most closely those associated with leadership development activities.

Associate Facilitators: Likely Candidates

Established consultants in the nonprofit sector (not necessarily in the arts) with experience in the dynamics of organizational change will most likely benefit from the Associate Facilitator opportunity. Organizational leaders in all arts disciplines – including Executive Directors, senior staff and artists – who recognize a consulting practice as a significant addition to their work (and who enjoy Board support for taking on such a role, where appropriate) may also be strong candidates.

While no specific experience in guiding adaptive work is required, an openness to learn new approaches to complexity, systems thinking, group dynamics, and organizational innovation is essential. Experience in leadership development is also likely to be an asset. Associates will work together and individually. Participants will need to be prepared to share their knowledge and expertise with the other Associates, to support each other in developing skills, and to be committed to action-learning throughout the program.

Associates can expect to benefit from learning new practices and tools, gain access to leading research in organizational change, and engage with approaches developed over more than a decade of EmcArts' work. Moving back and forth between training and practice is a principle that informs the Associate Facilitator initiative and is an essential dynamic in all forms of complex adaptive work. Associates will therefore also benefit from well-defined opportunities to try out new approaches, culminating in sole leadership of an Incubating Innovation and Scaling process.

The training sessions will balance knowledge development and the rehearsal of well-researched facilitation practices with action-learning in real-life situations (via Coaching and Incubating Innovation). EmcArts makes use of a variety of creative facilitation exercises, as well as arts-based activities, which will be built into the different sessions. To enrich the facilitation work, Associates will also be invited to share and exchange their own knowledge and experience.

EmcArts recognizes that there is no single “right” way to conduct process facilitation and sees the training work as an opportunity for appreciative inquiry around mutual interests, grounded in a common commitment to building public value through the arts. Necessary confidentiality rules will be adopted, and care taken over the use of shared materials. An overall emphasis will be placed on building a strong network of practitioners who can provide comprehensive “adaptive assistance” to nonprofits.

After the program, Associates will become a part of Metcalf's and EmcArts' process facilitator network. This network, and the new local emphasis on adaptive change, may provide the Associates with new work engagements and extend their practice.

Please note that, if an applicant for this initiative is affiliated with an arts organization, that organization does not have to be taking part in Staging Change for the applicant to become an Associate Facilitator.

Associate Facilitator Training Curriculum

The Associate Facilitator initiative of *Staging Change* will begin by offering training in EmcArts' programmatic approach to a group of up to **eight** Toronto-based consulting practitioners interested in advancing their skills and capacity to facilitate adaptive work. A cohort of up to **five** Associates, selected from within the original group of eight based on their interest in and capacity to deliver the adaptive work, will be invited to take on a leadership role in implementing the latter stages of *Staging Change*.

The group of eight Associates will attend the full Stage one Workshop Series and engage in three half-day training sessions led by EmcArts facilitators. In the Workshops, Associates will serve as participant-learners, sometimes working with each other while at other times taking part as additional contributors to the organizational teams.

The group of eight Associates will then shadow EmcArts facilitators in the Organizational Coaching stage of the program where they will take part as a Working Group member with one of the selected organizations (over three half-day meetings) and will observe the Coaching process from that vantage point.

At the conclusion of stage two, Metcalf and EmcArts will identify the group of five Associates who will lead stages three and four. Stage three of the initiative, Incubating Innovation, begins with a 2-day training session with EmcArts facilitators. Incubating Innovation is an extended engagement over a full year and involves up to 12 days of contact time. During this stage, each Associate is paired with one organization. Associates will follow a 3-phase process design, created and used by EmcArts, and integrate their own facilitation practices into the existing "container." Throughout Incubating Innovation, EmcArts staff will be available to support and advise the Associates as needed.

- Phase 1: two to three meetings per Team (with work in between meetings) — composition of each Innovation Team and preparation for Phase 2 Intensive Retreat
- Phase 2: Intensive Retreat (5 days) – acceleration of project design, creation of plans for iterative prototyping and plans for re-entry and enrollment of others
- Phase 3: two to three meetings per Team (with work between meetings) — prototyping period for repeated public testing and evaluation of emerging innovative strategies.

Finally, the group of five Associates will work with their assigned organizations over the final two-year period of the program dedicated to the Scaling stage. When appropriate, EmcArts will continue to act as advisors to the Associates during this fourth and final stage of the program.

Time Commitment and Anticipated Schedule

For the group of eight Associates, the estimated time committed to the Stage one Workshops, training sessions, and Stage two Organizational Coaching is a total of 9 days. Stage one and the Associate training series run from September to December, 2018. Stage two runs from January to June, 2019. Please note that the dates for Stage one are now confirmed. All successful applicants to the Associate Facilitator Initiative must be available for all of these dates:

Associates orientation session	September 5, afternoon
Workshop #1	September 6, 9am – 1pm
Workshop #2	September 27, 9am – 1pm
First Associate training session	September 27, 2 – 5pm
Workshop #3	October 25, 9am – 1pm
Workshop #4	November 8, 9am – 1pm
Second Associate training session	November 8, 2 -5pm
Workshop #5	November 29, 9am – 1pm
Workshop #6	December 11, 9am – 1pm
Third Associate training session	December 11, afternoon

For the group of five Associates, the facilitation of one team in Incubating Innovation is estimated to comprise of an additional 12 days of preparation and contact time and runs from September 2019 to August 2020.

The Scaling stage runs from September 2020 to August 2022 and will include another four days of facilitation.

Associate Facilitator Compensation

Associates will be compensated for each stage of the work as follows:

- **Stages One and Two:** up to eight Associates will receive an honorarium of \$400 per day for attendance at 9 days of Workshops, training sessions and Coaching meetings (total: \$3,600 each)
- **Stage Three:** up to five Associates will receive Incubating Innovation fees for up to 12 days of process facilitation, at a rate of \$900 per day (total: up to \$10,800 each)
- **Stage Four:** up to five Associates will receive Scaling fees for up to four days of support, at a rate of \$900 per day (total: up to \$3,600)

EmcArts Participants

Richard Evans, President of EmcArts, will lead the six Workshops. **Melissa Dibble**, EmcArts Managing Director and Lead Facilitator, will lead the Associates training sessions. **Three EmcArts facilitators** will guide the Organizational Coaching work, which the Associates will shadow. Associates will lead Incubating Innovation, with support from Melissa and the other facilitators.

Application Process

We highly recommend that interested candidates attend the program information session from 1-4pm on April 23, 2018. The session will be led by Metcalf and EmcArts. The last hour of the gathering will be devoted to the Associate Facilitator Initiative. The Associate Facilitator application form will be available on the Metcalf website by April 16, 2018. The deadline for applications is May 28, 2018.

In the meantime, please direct any questions regarding the Associate Facilitator program to Melissa Dibble at EmcArts (mdibble@emcart.org) or Michael Trent at Metcalf (mtrent@metcalffoundation.com) regarding the *Staging Change* program.

Dates to Remember

Associate Facilitator application release	April 16, 2018 (at metcalffoundation.com)
Staging Change information session (registration required at: https://2018-staging-change-info-session.eventbrite.ca)	April 23, 2018, 1-4pm
Associate Facilitator application deadline	May 28, 2018
Staging Change application deadline	June 11, 2018
Notification date for Staging Change and Associates	June 27, 2018