

Opening Doors

The First Five Years of the Metcalf Foundation's Performing Arts Program

January 2008

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FOUNDATION

Metcalf Foundation

The Metcalf Foundation helps Canadians imagine and build a just, healthy, and creative society by supporting dynamic leaders who are strengthening their communities, nurturing innovative approaches to persistent problems, and encouraging dialogue and learning to inform action.

Acknowledgements

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Introduction

Foundations must make important choices about what to support and how to extend that support. All funders want to understand the impact of these choices – to determine if the decisions were well-made, and what the results of the intervention were. Are we making the difference we hope for? If not, what could we do to realize the full potential of our commitment and resources? These are challenging questions.

In 2001, the Metcalf Foundation launched a new and innovative performing arts program. Five years later, we undertook a review of this program – it was the first time that our Foundation had ever embarked on a formal evaluative process. The review was completed between January and June 2006.

This document describes the context for the arts program and the review process that we undertook. It also includes a brief summary of the evaluators' report and recommendations, and what we learned about the Foundation's work in the performing arts sector.

The Metcalf Foundation

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

Our work is focused in three specific 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 that animate and facilitate lasting change. They create space for people to connect, communicate, and participate.

In pursuit of our charitable goals, the Foundation tries to:

- support dynamic leaders who are contributing to positive change,
- nurture innovative approaches to tackling tough problems and seizing opportunities, and
- encourage dialogue and learning to build knowledge and to inform action.

The Performing Arts Program

In 1999, the Metcalf Foundation began a multi-year process of transformation and reinvention. Our process was incremental as we began to develop a series of new granting programs within our areas of focus. The first of the new programs to be developed was in the performing arts.

When we began developing the new performing arts program, we were in search of deeper relationships and more meaningful impact in this sector. The development of the program was based on certain assumptions. We believe that small and mid-sized organizations are an essential component of the performing arts ecology. These companies are the primary incubators for the creation of new works in theatre, music, dance, and opera. They play a vital role in the development and employment of artists, administrators, and production staff. They contribute significantly to audience development and education, to facility creation and the re-use of existing sites, and to the renewal of urban neighbourhoods. By the late 1990s, however, many years of cuts to operating budgets, combined with rapid political, economic, and social change, had caused significant negative effects for these small and mid-sized organizations.

Two of these negative effects in particular concerned the Foundation.

- Organizations were expected to be creative, responsive, and effective in a difficult and rapidly changing environment, but they had very few resources with which to pursue innovative strategies for reaching their goals, taking advantage of opportunities, or responding to issues and problems.
- Budgets for assistant and/or apprentice jobs had virtually disappeared from operating budgets, severely limiting access to training and job experience for artistic, administrative, and production staff. This access has been vital, historically, to the development of human resources in the performing arts.

The performing arts program was designed to provide opportunities for organizations in redressing these two issues. We chose two complementary streams of funding.

- Under the Strategic Initiatives program (SI), small and mid-sized professional performing arts companies in Toronto have an opportunity, over a three-year period, to implement a strategic course of action that would not be possible under normal budgetary circumstances. It is the Foundation's hope that successfully implemented plans will make organizations stronger and more resilient, productive, and effective in the execution of their creative mandates.
- Under the Professional Development program (PD), the Foundation supports the training and development of artists, administrators, and production staff. Two parallel streams within this program provide opportunities for practitioners at different stages within their career: internships for individuals who have completed formal training and are in the early stages of their careers, and grants for senior practitioners to pursue significant opportunities for professional development or renewal.

The new performing arts program was launched in 2001. In order to allow a high degree of staff involvement with grantees and applicants, the Foundation hired a Program Director. For the SI program, we implemented a two-step application process and multi-year funding. We also created two advisory committees using members from the arts community. All of these actions were a departure from the Foundation's previous grant practice.

Preparing for the Review of the Arts Program

By the end of 2005, the Foundation had approved 58 SI grants. Our commitments in this program totalled \$5.6 million. In the PD program, we had invested almost \$2 million in 90 internships. The mechanisms that we had put in place to provide ongoing feedback to the Foundation had given us a lot of information, and we felt that we had sufficient critical mass of experience and observation to undertake a formal review of the performing arts program.

We decided that the review would have three goals. First, we would check the alignment between the strategies and outcomes of the performing arts program and the Foundation's mission. Next, we wanted to provide a portrait of what

was happening as a result of the program. What impact were the grants having on the recipient individuals and organizations? How did those individuals and organizations view their experience with Foundation and the arts program? Finally, we would receive recommendations, based on this research, regarding any changes and improvements that the Foundation might consider.

The Foundation decided that the evaluation would be strengthened by the involvement of an informed, intelligent, and objective outsider. We hired Wendy Reid as our lead evaluator. Reid brought to the position a 25-year career in arts management working with such organizations as the Toronto Symphony Orchestra and The National Ballet of Canada; she was also completing her PhD in organizational behaviour at the Schulich School of Business at York University. She chose Slade Lander as her assistant. Because we like to work collaboratively and openly, we determined that the review would be supervised by a small team:

- Sandy Houston, the Foundation's President;
- Catherine Smalley, the Arts Program Director;
- Anne Patterson Dunning, a director at Arts Action Research and a member of the SI advisory panel;
- Michael Jones, General Manager of The School of Toronto Dance Theatre and a recipient in both funding streams; and
- Pat Bradley, Theatre Officer and Research Director at the Ontario Arts Council.

Data was gathered through both interviews and surveys, and there was an ongoing relationship between the two methodologies. The Foundation was not aware of which organizations or individuals were interviewed. The evaluators ensured, however, that the interviews represented the broad range of organizations funded under the program, taking into consideration size of organization, artistic discipline, and length of time in the program, and interviewing individuals in both artistic and administrative positions, and both interns and mentors. The evaluators completed both a quantitative analysis of the grants in economic and numerical terms and a qualitative study through the analysis of interviews, surveys, and internal Metcalf Foundation documents.

For reasons of time and resources, we chose not to interview unsuccessful applicants to the program, but applicants who were successful on second or third attempts did participate in the review. We also chose not to include the Senior Artists and Administrators component of the PD program in this review.

Report Summary

Findings: Strategic Initiatives

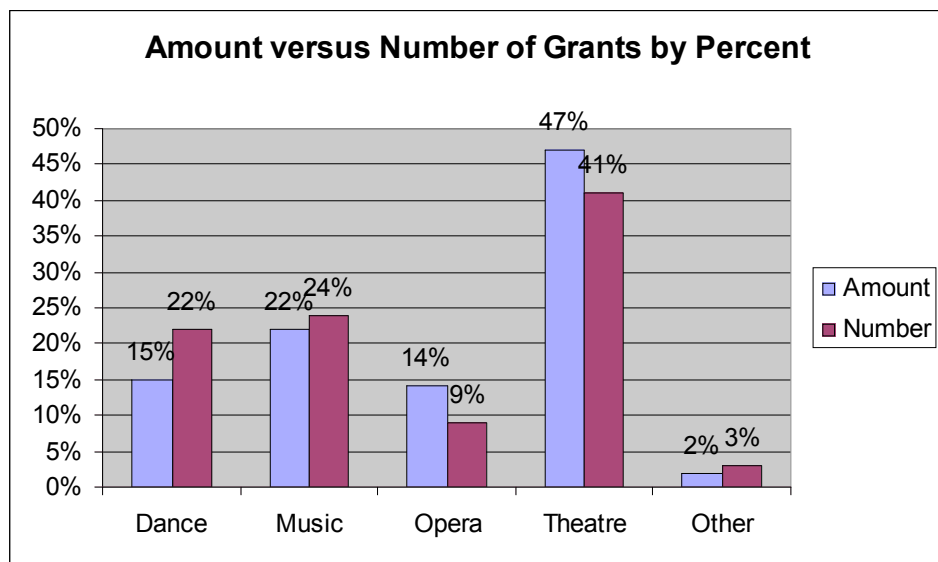
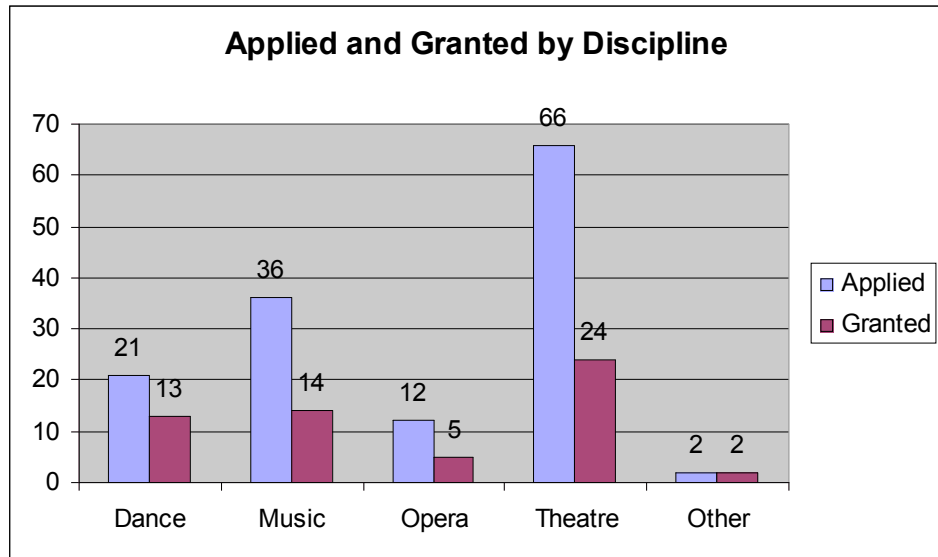
The SI program is designed to strengthen performing arts organizations over a three-year period as they strive to achieve strategic artistic and operational goals that have been defined by the organizations themselves. We hope for the following outcomes in this program.

- Applicants will engage in a rigorous review and the formulation of strategic responses to challenges and opportunities.
- Funded organizations will implement plans that will make them stronger and more resilient, productive, and effective in the execution of their creative mandates.

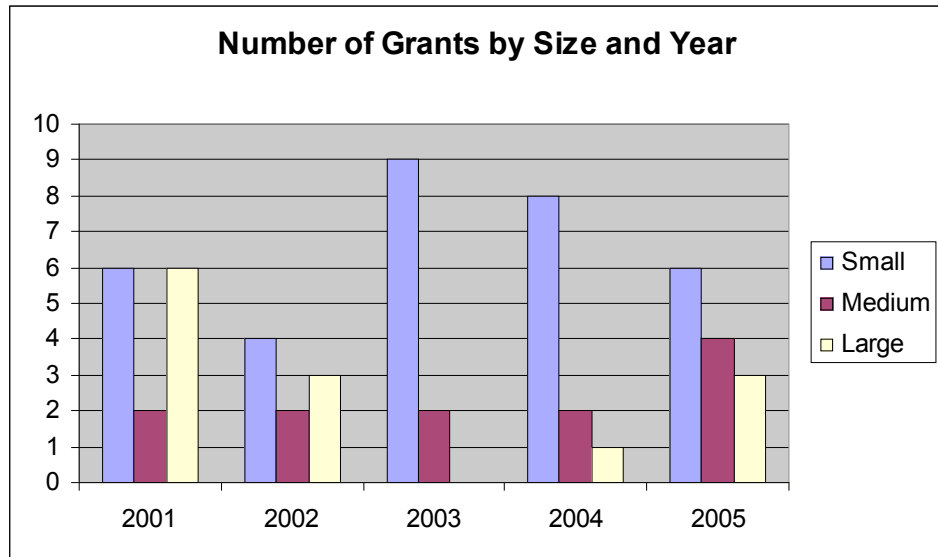
Quantitative Results

By the end of 2005, the Foundation had approved 58 SI grants (\$5.6 million), and 22 organizations had completed full three-year grants under this program.

The review showed that the largest number of applications had come from theatre organizations (47%), and they had received the highest number of grants from the program (36%). Dance and music organizations had a higher success rate per application, though, at 62% and 39% respectively. The very high success rate of dance organizations is striking, but, because grants are based on size of budget, this does not mean that the majority of the funds went to dance. Theatre (46%) and music (22%) received the highest proportion of grant dollars.



In terms of company size by budget, the majority of grants were given to small organizations (57%), but the majority of funds went to large companies (48%). Over the years the number of grants to large and small companies counterbalanced each other, rising or falling, while the number of grants to medium sized companies remained remarkably consistent. Given that size of the grant is based on the applicant's budget, it is not surprising that theatre and opera were the major recipients of the largest grants, while dance and music organizations received smaller grants.



There was a fascinating range of SI proposals, which reveals many things about the preoccupations of small and mid-sized organizations. In reviewing application documents, evaluators identified ten broad areas of focus:

- archiving or preserving work;
- audience development and/or marketing activities;
- development and related fundraising activities;
- educational outreach programs;
- new artistic works or creation processes;
- organizational development and transitions;
- production or dissemination activities, including exploration of web-based technologies;
- touring;
- training of artists and/or performers; and
- venue-based issues.

The review also noted that most SI grants involved two or more of these activities.

Analysis suggests that the Foundation had broadly, rather than narrowly, spread its support across these activities. It also indicated, however, that the Foundation is primarily supporting organizational development (27% of grants), defined by the evaluators as any activity that created a new position within the company or created major changes in their infrastructure, and audience development/marketing (19% of grants). This emphasis reflects the pressure on organizations to seek alternative funding and to broaden market demand.

Qualitative Results

What Organizations Chose To Do

Grantees describe the goal of the SI program as supporting “strategic risk, change, and learning”. This is very much in keeping with the Foundation’s mission.

The fact that organizations seem to be focusing on organizational infrastructure, audience development, and marketing reflects the intensely competitive environment for both audiences and operating funds; the pressure to seek alternative funding and to broaden market demand is real.

Initiatives, however, involve trial and error in the choice of strategies. They require time to be implemented and assessed and to become effective. It is difficult for organizations to risk operating funds in this manner. When the funds for experimentation and learning are available and the time to fully explore and implement new ideas is given, arts organizations can be exceptionally creative and effective.

The SI program is seen by respondents to provide an important and unique opportunity, which is very complementary to existing operating support. It is considered particularly synergistic with technical assistance programs such as the Creative Trust, Flying Squad, and Compass.

The Importance of Process

While there was strong support for what the Foundation had chosen to fund, there was an even more powerful response to manner in which we have gone about it. The design of the arts program proved to be a very significant part of its perceived success.

The evaluators defined the program as “inner-directed,” by which they meant that applications are shaped by the applicant’s own priorities and not by the specific external criteria of a funder. The Foundation does not suggest what kinds of initiatives organizations should undertake, but it does insist that applicants go through a rigorous self-assessment in order to define a strategic course of action that will move them forward – in whatever direction they have chosen. This requires a different way of thinking than is required to create a proposal to meet the external, defined interests of a funder. Particularly in the beginning, many organizations just wanted to be told “what the Foundation wanted to fund,” so they could apply accordingly. Helping them to think differently and to work through their own situations, needs, and potential opportunities is a big part of the role of staff. It is a kind of consulting practice, and it is highly valued by applicants.

This process, however, can be challenging, particularly for small organizations. One respondent said it required thinking in a new way just to

make the application. First, they had to consider that their organization might exist in three years; second, if it was to exist, they had to determine how it would need to be different in order to make the organization better; and third, they had to envision what the organization needs to do in order to achieve this goal. This type of planning process is very different from thinking on a project-to-project basis.

We also heard clearly that time is an important gift for an SI grant. The three-year funding period gives organizations a better chance to realize their plans, to learn, and to incorporate that learning as they move forward.

The evaluators noted that the inner-directed approach is a rich one, but that it presents real challenges to the Foundation's staff and the advisory committee. The assessment process is difficult, since there is always a wide range of type and size of grants in any round of applications. Over the years, the committee has developed a particular approach to these discussions. They focus on the clarity, integrity, and potential effectiveness of each proposal in relation to the vision and scope of the organization that has proposed it, regardless of the organization's size.

Relationships

The money, of course, is crucial, but the review also showed – to a surprising degree – that the nature of the interaction between the grantee and the Foundation could be as important as the grant in the context of learning, thinking, and changing attitudes.

There is a great deal of power inherent in a funding relationship. Because of this power, relationships with funders can generate guarded and complex behaviour by funded organizations. A key theme in both the interviews and surveys, however, is that the Foundation views its clients as competent professionals who are intent on accomplishing their goals and who are in the best position to determine how to do so. The evaluation confirmed what we have felt over the past five years: our grantees respond strongly to the respectful approach that we feel is essential to producing a sense of partnership.

That partnership is realized through an ongoing, supportive, and frank relationship with Foundation staff, which starts even before applications are submitted. If grant recipients are comfortable in this partnership and feel free to be authentic and honest in their communications with the Foundation, this, in turn, promotes greater openness on their part to the challenges in their organizations and initiatives. This dialogue encourages the organization to deconstruct assumptions, to challenge established norms, and to create novel solutions to the issues that are important to them.

An openness to unexpected results and a focus on learning are hallmarks of the program, and the Foundation works hard to ensure a high quality of

interaction with each applicant. The message that emerged from the evaluation is that the time and thought invested in this manner and approach is an important resource to the SI program, and such investment provides strategic impact to the Foundation's funding. It is important for the success of this approach that the Program Director have credible arts experience.

Management of the Arts Program

While SI respondents were aware that the Foundation uses outside advisors, these individuals did not have a major presence in the minds of applicants. The evaluators felt that this was probably due to the significant role of staff as the primary and ongoing contact for applicants. Nevertheless, it was clear that the use of such advisors enhances the perceived professionalism of the program. It provides valuable perspective and advice to the Foundation on the assessment of applications and the development of policy in the program.

The three-year time frame, the use of outside advisors, and having professional program staff were all new ways of working for the Foundation in 2001. From an internal management perspective, the review has shown us that these were good choices that have enhanced the effectiveness of the program. The impact of this combination – self-directed choice of priorities, time to fully realize experience, and extended partnership with Foundation staff – seems to enable significant change and learning within a grantee organization.

Definitions of Success

We expect organizations to consider carefully how they will decide if their initiative is a success. We cannot make that judgment for them, but they must be clear about how they will make those assessments. This is a major part of our annual discussion with grantees. When organizations are trying to do things differently and better, things do not always proceed according to plan. Unexpected consequences abound, some good and some bad. The Foundation understands this. We encourage grantees to be reflective about their work and to consider how results, anticipated or not, will affect their plans and strategies as they move forward.

Paradoxically, the evaluators found that being able to conceive of moving away from the stated goals in the application can encourage thinking about a wide range of definitions of success. Respondents felt that they could turn their energy to working on the challenges and surprises that they were encountering in a straight-forward manner; the Foundation staff were allies in finding solutions to those problems.

Annual meetings with SI grantees forge much stronger and better-informed relationships than just written reports. It is often in conversation that an Artistic Director says “why did I think a new staff member would mean less work

for me?” or a founder reports “for the first time I’m beginning to see that my organization can have a life beyond me”. At these times, it is clear that significant reflection and learning is taking place.

Impact on the Sector

The review suggested that enabling organizations to think differently about issues or to try new approaches to solutions and opportunities could be of real benefit to the sector as a whole. For example, organizations that are exploring founder transitions, different management models, or new technologies can make and share important discoveries. Individual projects can also have an effect that goes beyond their own organizations, such as the training of artists who are then hired by other companies.

It is also possible that multiple grants on a similar theme (such as the grants for preservation and archival activity in the dance community) may have a cumulative effect. These grants can enable an organization to look at a concern they had for their sector and to approach it in a new way; companies can challenge and break down what was considered the norm for their sector. The SI grant can provide not only the practical funding needed but also legitimization for a novel course of action.

The evaluators found tantalizing anecdotal evidence of sectoral impact, but they considered it too early in the life of the program to reach any definitive conclusions.

Sustainability

Sustainability is another theme that the evaluators were charged with investigating. Are the organizations able to maintain whatever change has occurred during the SI grant, or do they return to the previous status quo because of resource constraints? Do the grants promote permanent change?

Sustainability is a concern shared by the evaluation respondents. Grantees realize that SI funding is for strategic change, not ongoing operations, but a repeated theme was that once a positive change or a discovery has been made, it is “impossible to go back”. Once an organization sees “what’s on the other side of that door we were finally able to open,” it knows more than it did before, and this newly acquired insight and knowledge continues to influence its behaviour. How do organizations reflect this in practice once the Metcalf funding is no longer there?

Some initiatives were finite and ended, although the results for the organization may continue for some time to come. In other cases, the additional advantage to a three-year time frame was the chance to demonstrate success and to find alternative funding for a successful initiative. Operating funders are often asked for additional resources, which can be a matter of frustration to both

funders and applicants if these funds are not available. Other key funders, such as the Ontario Trillium Foundation or private sources, are approached to maintain or expand initiatives. Some organizations find ways to rearrange resources to support the new function or aspects of it.

In general, organizations approaching the end of their grants were more apprehensive about sustainability than those that had completed their grants and were looking back. Here again, evaluators concluded it was early in the process of organizational and sectoral change to assess this issue.

Findings: Professional Development

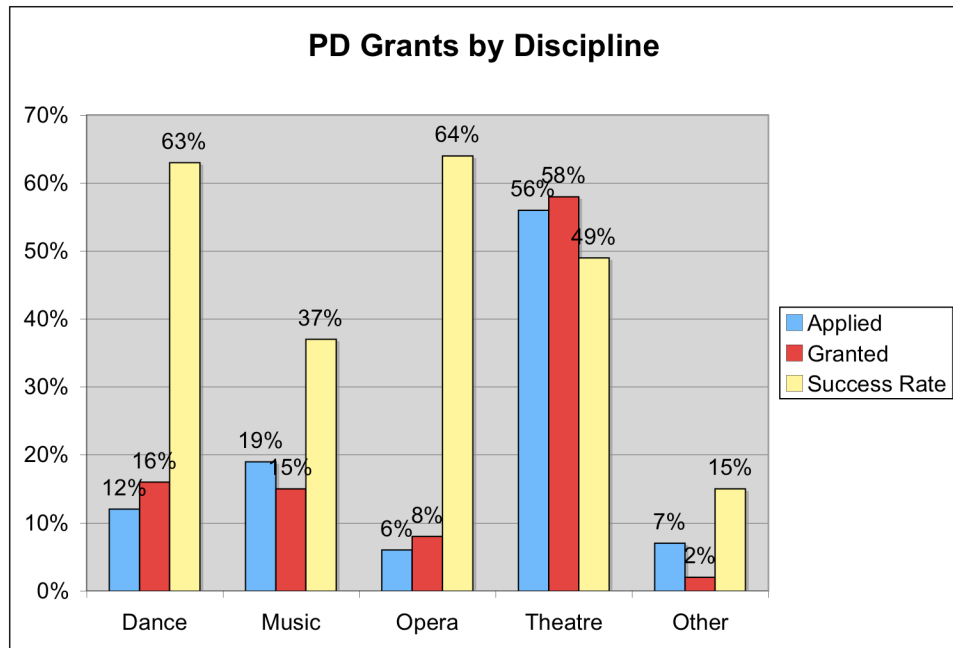
The PD component is designed to support training and professional development for artists, administrators, and production staff in the performing arts through paid internships for those entering the field and funded opportunities for established professionals. We hope for the following outcomes in this program.

- Organizations will provide more formal, on-the-job training opportunities for emerging professionals in areas critical to the performing arts.
- Individuals will have more knowledge, better skills, and broader work experience, and they will be able, therefore, to make a stronger professional contribution in the performing arts.
- Senior artists and administrators will have opportunities for professional renewal and replenishment, encouraging longer and more productive careers for leaders in the performing arts.

Quantitative Results

By the time of the review, the Foundation had funded 90 internships, valued at \$2 million.

The review showed that the majority of PD applications (56%) and grants (58%) involved theatre organizations, but opera and dance had higher success rates per application (64% and 63% respectively). There was a reasonable consistency in the number of organizations receiving grants by discipline, and the positions funded have been evenly distributed among the areas of administration (39%), artistic (34%), and production (27%). The average length of internships was quite consistent, varying from 9.4 to 10 months (average 9.7 months).



The overwhelming majority of interns, more than 90%, report that they are continuing to work in the sector. Since the Foundation’s tracking of interns is informal, however, the evaluators found that it becomes increasingly difficult to follow-up with interns who are the farthest away from the completion of their internships.

Qualitative Results

Importance of Duration and Relationships

The Metcalf Foundation’s PD grant is unique. It is longer than similar grants, and it does not have any demographic restrictions.

With a year-long placement, interns are able to be fully integrated into their organizations. Their tenure covers a long arc of activities, and they gain a rich experience. In several instances, the duration of the internship allowed an individual to realize they did not like the work that they had originally wished to pursue, but they also had time to explore alternative roles in the organization. This is significant learning for individuals embarking on careers in the sector.

The choice of interns is often based on a previous relationship generated by co-op placements, volunteering, teacher relationships with the organization, and/or networking. The evaluators were struck by how important a pre-existing relationship between the intern and the organization was. The close nature of these relationships reduces the risk of a bad placement that results in a disruptive waste of time, effort, and resources for both the intern and the organization. An application to the PD program involves both the intern and the mentor; this helps to ensure that the situation is customized for their

relationship. The PD program is, like the SI, inner-directed. The personalized negotiation between the intern and the mentoring organization is key to the program.

Individual Learning: Interns and Mentors

Learning is a fundamental goal of the PD program, and it was acknowledged as such by both interns and mentors in the interviews and surveys. The evaluators discovered that learning takes place in more ways and at more levels than are immediately apparent.

Mentors want to provide an education for interns beyond specific skills. The evaluators found that a very important part of the experience is learning the social conventions of the organization and developing a network within the sector. The desire by the organization to orient and integrate the intern into the culture of the organization (including etiquette, sensitivities, rituals, and relationships) seems very significant to the mentors. This reinforces both the internal strength of companies and sectoral identity, and it was seen as an important impact of PD funding.

Owing to the nature of the selection process for the internships, having had a PD grant can become a label of legitimacy for the intern. Over time, these grants may provide distinctiveness for former interns in the labour market.

Although all of the intern survey respondents rated their relationship with their mentor as “good” or “very good,” their comments also reflected some frustration at having less sufficient access to the mentor amid the everyday pressures and demands of working.

Organizational Learning and Change

The inner-directed learning of the intern can impact the mentoring organization as well. This is particularly true for smaller organizations. They report that an intern can create as much change within the company as the experience can offer to the intern. With a bright and capable intern in place over a long period of time, leaders of these organizations must consider issues from the point of view of another professional. They are forced to conceive of the organization as more than an extension of themselves. This can change the way they think about their work.

Owing to limited resources, the ability for organizations to provide good mentoring appears to be of greater concern in small organizations than in larger organizations. Small companies need to be resourceful in establishing mentoring relationships. On the other hand, these companies can provide broad, hands-on experience over many aspects of running an arts organization.

Some large organizations have developed extensive and formally conceived internship programs. During the review, they expressed an interest in a more permanent relationship with the Foundation.

One of the Foundation's objectives with the PD program is the development of a learning and mentoring culture; the researchers were charged with exploring this culture. While the interns felt that there had been changes as a result of their presence (new ways of doing things, new programs developed), the mentors seemed to find different changes in their organizations. Many indicated that the company was developing a more positive and deliberate attitude about training.

Networks and Sectoral Impact

A multi-level impact is very evident in the PD program. The majority of interns continue to work professionally in the field, which strengthens the sector as a whole. As well, the organizations who mentor appear to be developing a positive concern and interest in this activity, generating more embedded support for leadership in the sector.

The main motivation for mentoring appears to be the transfer of information and understanding on to the next generation. While some self interest was found in the survey responses (such as having another position funded in the organization), the main interest of mentors and organizations was the impact of the PD program on the overall sector.

The network of contacts created through these internships serves as a source both for future employment and for advice and knowledge. The impact of this networking is found at the individual, organizational, and sectoral levels.

Recommendations

General Recommendations

Maintain the self-defined evaluation criteria in both the SI and PD programs.

The inner-directed nature of both programs is unique in the funding environment in Ontario, and there is a range of learning and insights that arise from this approach. It enables the development of self-efficacy where a sense of self-confidence and hope in the future are present. It is empowering for grantees, who may feel that their activities and/or their development have been directed by other funding bodies.

Maintain the current length of time for both the SI and PD grants.

The three-year granting period is considered one of the most important features of the SI program. It provides significant time to experience several cycles of the initiative, and it allows the organizations funded to demonstrate the most mature level of understanding and learning. It supports sustainability of the ideas or of the innovation directly.

PD grants allow an internship up to a year. This provides the intern with a full cycle of experience that enables them to learn extensively and to become fully integrated into the organization. It also enhances a range of learning, especially related to cultural norms and networking.

Maintain the advisory committee membership and culture.

There has been a culture developed that ensures an institutional memory, a means of making recommendations, and a vocabulary that enables discussion. A process of slow change in committee membership provides rejuvenation but maintains consistency.

Keep convening group meetings with the clients in both programs.

Everyone participating agreed that these were interesting and helpful sessions that provided comparative information and networking opportunities. Sessions also provide ongoing and current information to the Foundation regarding the impact of funding for the organizations and the interns.

Future Considerations

The evaluators suggested a variety of areas for future consideration.

- The Foundation should watch for the potential creation of a group of clients that are effective and confident innovators. We will want to determine whether organizations are thinking in more creative ways because they have ongoing access to funding that can respond to this type of innovative thought.
- As organizations become eligible to re-apply to the SI program and may apply repeatedly to the PD program, the Foundation needs to ensure accessibility for new organizations.
- The Foundation should continue to monitor its relationship with other technical assistance programs, such as the Creative Trust. Complementary consulting activity from these programs seems to aid in the development of, and learning from, work in the SI and PD programs.

Recommendations for the SI Program

Maintain the consulting approach to SI grants.

The active involvement by staff in the application process and in ongoing evaluation of the funded initiatives is a hallmark of the Metcalf Foundation. It strengthens the unique learning that is involved in these kinds of risky developmental activities. It is important both for the organizations and for maximizing the impact on the sector. The approach generates a special relationship between the funded organization and the Foundation that enables honest, open, and creative analysis of developments to the intended initiative.

Keep the two-stage application process for the SI grant.

The combination of the letter of interest, followed by a conversation with the Foundation, and then a full application is an approach that is very much appreciated by the applicants. It also appears to be important for the impact of the grant.

Future Considerations

It might be useful for the Foundation to consider the possibility of an organization holding more than one simultaneous SI grant, assuming that the total of all of their SI funding is less than or equal to the maximum grant cap. These grants could start in the same year or in staggered years. This would be particularly helpful for large organizations. Since the amount of SI grants is dictated by budget size, larger organizations are often challenged to identify specific initiatives that would enable them to spend the full amount in a given year. In the case of organizations holding concurrent grants, however, each individual grant could still be followed, as they are now, by a year of ineligibility.

The balance between large and small organizations may need to be monitored over time. It continues to be appropriate to maintain a sensitive eye on the process; recruiting and nurturing applications from smaller organizations may be a way to ensure ongoing accessibility. This kind of affirmative action would pose a real dilemma, however, if it ran counter to the approach of inner-directed applications.

Recommendations for the PD Program

Future Considerations

It may be useful to promote the PD program more actively, especially in the music sector. This might also involve more hands-on work to help develop the organizations' applications. The Foundation also needs to consider internships for fundraisers in both large and small organizations, provided that the mentoring is professional and appropriate.

There appears to be an opportunity to develop long-term relationships for formal training placements with a number of large organizations in the sector. This requires debate and reflection.

There is interest from a number of mentors in meeting once a year; it is thought that such sessions could be useful and helpful, in the same manner that meetings are helpful for the interns and for participants in the SI program. It could also create a network among mentors that may strengthen the sector and provide cross-pollination about the training culture.

Conclusion

In 2001, after a period of intensive re-assessment, the Metcalf Foundation launched a new and innovative performing arts program. We asked an important question – what would happen if we approached our arts funding in a completely different way? Five years later, we are starting to see some answers to this question.

The sector has responded enthusiastically to the opportunity to embrace strategic risk and change. Organizations and individuals have worked hard to identify and respond creatively to a host of issues facing them. They have shown us that the values and approach we brought to the program are important factors in its success.

In a context of the opportunity afforded by the program and the prospect of rigorous strategic review, organizations asked their own important questions, such as what would happen if they:

- created a new position in a specific area?
- trained artists differently?
- moved into a new facility?
- tried a different approach to pricing and marketing?
- took advantage of opportunities to tour internationally?
- put the difficult question of succession openly on the table?
- found a way to provide better training for production managers?
- gave a young director an opportunity?
- tried to make a long-imagined partnership happen?

They are using the program to open new doors in the pursuit of better art, stronger organizations, and more highly skilled people. Sometimes these explorations unfold as planned, and sometimes they don't work out as everyone

thought they might. Regardless of the outcome, however, we have learned that our grantees have been through a process that can be a powerful catalyst for change. This process is characterized by self-determined priorities and strategies, the requirement of rigour, the cultivation of candour, and interactive and iterative learning, and it is abetted by significant quantities of time and money. Whether the changes in organizations are intentional and dramatic or subtle and surprising, the review has confirmed for the Foundation that this process and the learning it promotes continue to influence behaviour and attitudes, even when the future unfolds in unexpected ways.

We are delighted with our experience in the program so far. The Foundation has reaffirmed its commitment to the performing arts and to the continuation of this program.

It has been our hope since the beginning that we can use our resources to enable individuals and companies to realize their full potential. Although it is still early in the life of the program, this review has shown that by supporting organizations as they make strategic decisions about the future and by strengthening the skills and experience of individuals in those organizations, the Foundation is contributing to sustaining a vibrant performing arts community in Ontario.

Opening Doors

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