

# PERFORMING ARTS PROGRAM

## Staging Change

### Stage 1: Building Adaptive Capacity

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#### 2020 Application Guidelines

#### 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.

#### We focus our efforts on three areas:

- supporting long-term strategies that create sustainable economic opportunities for low-income people and communities in Toronto;
- working at the intersection of climate, biodiversity, and sustainable livelihoods; and
- supporting leadership and innovation in the performing arts.

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 and charitable 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 encourage success by:

- supporting dynamic leadership — celebrating, developing, and strengthening leaders who are contributing to positive change;
- nurturing new ideas and practices — 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 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

Art is a transformative way of learning about ourselves and the world we live in. Artists challenge our assumptions and bear witness to our common humanity. The environment that enables the arts sector to achieve these impacts, however, is changing in unpredictable ways and faster than ever before.

Shifts in audience tastes and demographics, increased competition for audiences, limited new resource development opportunities, and the need for new leadership are just some of the challenges the sector faces today.

Our multi-year strategic funding initiatives help organizations build the capacity to adapt and innovate. The Johanna Metcalf Prizes celebrate promising individuals who will lead the sector into the future. And our internships match emerging practitioners with exceptional mentors.

[Staging Change \(information and application follow\)](#)

[Johanna Metcalf Performing Arts Prizes/Les Prix Johanna-Metcalf des Arts de la scène](#)

[Leading and Learning](#)

[Performing Arts Internships](#)

## STAGING CHANGE

*Staging Change increases the number of organizations in the City of Toronto who are able to meet the sum of their ambitions by applying adaptive strategies to complex challenges in the face of a rapidly changing sector and world. This second cohort of Staging Change is offered at a time when the twin emergence of a global pandemic and a renewed call for social justice is adding to the complexities facing the arts sector.*

Metcalf is pleased to offer the second cohort of *Staging Change*, the Foundation's current multi-year strategic funding initiative in the performing arts. Delivered in collaboration with **EmcArts**, an arts-focused non-profit service provider based in North Carolina, *Staging Change* provides adaptive learning in support of innovation within performing arts organizations in the City of Toronto.

At the core of the expertise that EmcArts brings to our grantees, is the practice of adaptive change, which celebrates and advances innovation by enabling organizations to test innovative responses to complex challenges. In times of rapid change in the non-profit arts sector, the establishment of a re-imagined and potent set of organizational capacities is crucial.

For the first 60 years or more of the modern professional arts sector, the field focused on growth and longevity – on building sizeable audiences and sustainable organizations that were in it for the long haul. The primary emphasis was on maintaining “organizational stability” as arts companies grew, on defining and pursuing what became “business-as-usual.”

In the past 15 years, all this has changed. Dramatic shifts in the operating environment have placed radical new demands on arts organizations. To remain healthy and resilient, and to maximize the delivery of public impact and value, they now need very different approaches. Changes in patterns of public participation and in technological access to the arts, generational and demographic shifts, new forms of resource development, and many more factors have revealed that there is an additional set of organizational capacities that is critical for the future. For the public impact and value of professional

arts organizations to be sustained and increased, each organization in the field must find its own right new balance between stability and adaptability.

In the past, organizations have not focused on strengthening adaptive capacities such as distributed leadership, nor have they equipped themselves to continuously invest in incubating innovation. In structuring their staff, organizations now need to make strategic use of cross-functional, multi-constituent teams; and they need to develop organizational cultures that are intrinsically flexible and proactive in seizing fleeting opportunities and responding to changing community dynamics. Notably absent to date in the field – and urgently needed to foster innovation – is available innovation capital to underwrite well-designed new initiatives and enable them to reach new markets.

To reinforce the remarkable adaptive work underway in some organizations, *Staging Change* provides support for organizational innovation. Instead of the “technical assistance” of the past, the program offers “adaptive assistance” that builds the adaptive muscles of arts organizations, provides underwriting for experimentation and scaling, and helps ensure a vital, engaged field that is ready to seize the future as a leading contributor to the vibrancy of our communities.

Since early 2020, however, the arts sector, and indeed the world, has been further challenged by a global pandemic and a renewed call for social justice, that combined create a new set of destabilizing, profound, and existential conditions. *Staging Change* is a process that will help arts organizations re-imagine themselves, build new adaptive muscles, and contribute to the field’s renewed future in order to prevent a return to the status quo that many now feel is no longer viable let alone desirable.

Richard Evans, Co-founder and President Emeritus of EmcArts, says this about our current moment:

*In the past, we have taken André Gide’s axiom that “one cannot discover new lands without first consenting to leave the shore” as a rallying cry for performing arts leaders and organizations that are in a place to choose to adapt (before circumstances compel it). Now, the entire sector is unmoored and trying to navigate complex uncharted waters. No longer is it only pioneers and early adopters that Staging Change might engage, but the wider spectrum of performing arts organizations that are struggling to make sense of current and emerging conditions – who have had the need for innovation and radical adaptation thrust upon them, like it or not. The thought patterns, sense-making, new skills, and non-traditional team work needed to begin organization-wide adaptive work are now critical to the future of the sector.*

## **Program Structure and Funding Parameters**

In its first offering in 2018, *Staging Change* was delivered over a four-year period through a staged or tiered funding stream: successful organizations moved sequentially through the program, beginning with mandatory participation in Stage 1, followed by an application and assessment process for invitation to each of the remaining three Stages.

At this time, we are only announcing Stage 1 of the 2020 edition of *Staging Change*, although our intention is to offer the balance of the program in the years to come in much the same way as we did for the 2018 edition. Given the considerable unknowns that we are currently facing the sector and the spirit of experimentation and learning that underline *Staging Change*, we felt it prudent to hold off on announcing the content and timing of subsequent stages so that Metcalf and EmcArts could adapt as needed in order to provide the most potent experience possible.

However, in order for potential grantees to understand the full scope of the initiative, we are happy to provide an outline of the four stages as we know it now:

**Stage 1: Building Adaptive Capacity (this application):** An online Workshop Series of ten (10) 90-minute sessions (the first session is two hours) for small teams from up to 10 organizations, aimed at engaging early thinking and practice around adaptive change. Each organization will receive a **\$3,000 Participation Grant**. Stage 1 is led by the EmcArts team in partnership with Metcalf Adaptive Facilitators.

**Stage 2: Rehearsing Adaptive Change (to be confirmed):** Six 2-hour gatherings of individual Experimentation Teams from up to six organizations from Stage 1, over three to four months, to include the design and carrying out of multiple Small Experiments with Radical Intent (SERI's). Each organization will receive a **\$5,000 Experimentation Grant**. Stage 2 is facilitated by Metcalf Adaptive Facilitators with support from the EmcArts team.

**Stage 3: Incubating Innovation (to be confirmed):** a one-year process to come together in potentially three face-to-face meetings of specially composed Innovation Teams from up to three Stage 2 organizations, followed by a shared Intensive Retreat, then prototyping the most promising new ideas. Each organization will receive a **\$25,000 Prototyping Grant**. Stage 3 is facilitated by the Metcalf Adaptive Facilitators with support from the EmcArts team.

**Stage 4: Amplifying Innovation (to be confirmed):** an additional two years of funding and support for organizations who have successfully completed Stage 3, with the aim of amplifying emerging major new strategies developed from prototyping work. Each organization will receive up to a **\$75,000/year Amplification Grant**.

### Stage 1: Building Adaptive Capacity (November 2020 – February 2021)

The series of 10, 90-minute online Workshops (the first session is two hours) will be for teams of three to five participants from each organization. At minimum, teams are comprised of artistic, administrative, and board leadership. In addition to the synchronous Workshops that prioritize interaction among participants, each organization will be responsible for doing advance work asynchronously using sections of the online EmcArts Fieldbook for essential content introductions.

Stage 1, led by EmcArts staff, guest faculty, and Metcalf Adaptive Facilitators, constitutes a curriculum in innovation and adaptive change, grounded in the situations and real issues of each organization. Participants will be provided with the tools and training to identify complex challenges that they are facing, investigate long-held assumptions about how they do business, and individually assess their capacity to adapt. Additional topics include: team composition and team dynamics for adaptive work, strategy development, resourcing innovation, and making innovations part of your core business. Each workshop is built on the research findings of authorities in the disciplines of organizational learning and change; the work in each session fuses those insights with the practical real-life challenges the participants are facing.

The online Workshops are designed in four clusters that all 10 organizations participate in as a cohort. Clusters 1, 2, and 3 are each followed by an organization-specific debrief session (either virtually

or on-site depending on public health guidelines and participants' comfort levels with in-person gatherings) with one of the Metcalf Adaptive Facilitators. Each Workshop is preceded by individualized online Fieldbook work and the virtual sessions are led by two EmcArts facilitators, an online education/learning lead, a teaching artist, and Metcalf Adaptive Facilitators.

## Program Schedule

### Stage 1: Building Adaptive Capacity

#### Cluster 1: Orientation to Complexity

November 10, 2020	Workshop #1 (10am-12pm)
November 12, 2020	Workshop #2 (10-11:30am)
November 19, 2020	Workshop #3 (10-11:30am)
Week of November 23, 2020	Debrief #1

#### Cluster 2: Responding Adaptively in Complexity

December 1, 2020	Workshop #4 (10-11:30am)
December 3, 2020	Workshop #5 (10-11:30am)
Week of December 7, 2020	Debrief #2

#### Cluster 3: Developing an Experimental Approach

January 12, 2021	Workshop #6 (10-11:30am)
January 14, 2021	Workshop #7 (10-11:30am)
Week of January 18, 2021	Debrief #3

#### Cluster 4: The Adaptive Journeys of Teams

January 26, 2021	Workshop #8 (10-11:30am)
January 28, 2021	Workshop #9 (10-11:30am)
February 3, 2021	Workshop #10 (10-11:30am)

## Adaptive Facilitator Training Initiative (AFTI)

Metcalf is committed to supporting individuals in the charitable sector over the arc of their careers. In its ongoing desire to celebrate, develop, and strengthen leaders who are contributing to positive change, the Foundation wishes to support dynamic leadership development as an integral part of the Staging Change program. As we work alongside EmcArts in the delivery of Staging Change over the next few years, we wish to cultivate a local team of adaptive facilitators who will partner with us to grow and deliver future versions of this multi-year funding program in the arts. At this time, AFTI has been put on hold while we continue to assess the best way to address the leadership development goals of the Foundation and the local facilitator community. We are pleased, however, to be partnering with three Metcalf Adaptive Facilitators from the first cohort on the delivery of this new offering: Sue Balint, Alicia Payne, and Pru Robey.

## Eligibility, Readiness, and Suitability

Applicants to Staging Change **must**:

- be professional theatre, dance, music, or opera organizations or those working between and among these disciplines (including creation/production companies, festivals, professional training institutions, and service organizations);
- maintain a professional staff (organizations of all sizes are encouraged to apply; the recommended staff capacity is 1 FTE; it is most important that organizations commit to having a consistent team engaged and present for the duration of the online workshops);
- be based in the City of Toronto (organizations who are located in the GTA **may** be considered if they have a significant presence in the City of Toronto);
- have a minimum of three years' of organizational/production history; and
- have a current, valid charitable registration from the Canada Revenue Agency.

## Important Dates & Deadlines

introductory webinar and info session	September 16, 2020, 1:30-3pm
application deadline (Stage 1 only)	<b>October 5, 2020 2pm</b>
notification of participation	October 23, 2020

The Foundation is unable to consider late or incomplete applications for funding. Electronic copies **must be received at the Foundation** by the time and date listed above.

Please note that, at this time, the Foundation plans to launch a new cohort of Staging Change every two years: a third cohort of Staging Change will begin in 2022, with no intake in 2021.

## Application Resources

### On Adaptive Change in the Arts

- <http://www.giarts.org/article/entering-upon-novelty>
- <https://www.giarts.org/article/building-resilient-sector>

### Articles and Stories from Staging Change 2018 Cohort

- <https://metcalffoundation.com/metcalff-story/metcalf-interview-richard-evans/>
- <https://metcalffoundation.com/metcalff-story/staging-change-participants-engage-in-small-experiments-with-radical-intent/>
- <https://metcalffoundation.com/metcalff-story/staging-change-participants-attend-five-day-incubating-innovation-intensive-retreat/>

### EmcArts Case Studies from Past Program Participants

- <https://metcalffoundation.com/46TuC>

(The Denver Centre Theatre Company, Northern Alberta International Children's Festival, The Music Center (Los Angeles), Cleveland Public Theatre, and The Wooster Group (New York).

## Funding Decision

Applications will be reviewed by the Foundation's staff and advisors. Decisions on participation are final. Your application will help the Foundation understand more about your organization's readiness and suitability to the program, including:

- Ability to identify complex challenges and possible adaptive responses
- Institutional capacity for innovation and adaptive change, notably:
  - Leadership with demonstrated ability to adapt in response to changing conditions
  - A clear understanding of organizational assets and barriers in supporting adaptive work
- Ability to learn from previous attempts at innovation
  - Organizational self-awareness, including the ability to reflect on past experiences (failures as well as successes), learn from them, and apply this learning
  - Searching questions being asked in the early stages of adaptive work
- Fit to the Staging Change program
  - Alignment between organizational priorities and the purpose and construction of the program
  - Preparedness to have artistic, executive, and board leaders (or more) involved throughout the entire process
- The likelihood of benefits accruing to the organization from participation
  - Alignment between expected organizational benefits and the purpose and construction of the program

## 2020 Staging Change Application Requirements – Stage 1

If you have any questions or any problems when completing this application, please contact the Performing Arts Program Director Michael Trent at: [mtrent@metcalffoundation.com](mailto:mtrent@metcalffoundation.com) or 416-926-0366 x 225.

**Note:** The following section is available in a [Word version](#) at [www.metcalffoundation.com/performing-arts](http://www.metcalffoundation.com/performing-arts)

### PART A: General Information

Name of Organization:

Primary Contact Name and Position:

Mailing Address:

Telephone:

Email:

Website:

Charitable Registration Number:

What is your current year annual operating budget?

How many paid, full-time equivalent (FTE) staff members does your organization employ?

1            2-4            5-7            8-12            13-20            21+

### PART B: Application Text – maximum 4 pages total, with a suggested length for each section below (do not start a new page for each section)

Please address all of the following questions in your application, using no smaller than 11-point type and please number your pages.

1. What are the core activities of your organization? **1/3 page**
2. What is your vision for success for your organization? **1/3 page**
3. Who do you serve? **1/3 page**
4. **Complex challenges and adaptive responses: 1 page** The challenges that organizations face play out in a variety of contexts – clear, complicated, complex, and chaotic. Of these, two produce known or knowable challenges: when the context is clear, existing best practices can be used to predictably solve problems; and, when things are complicated, expert knowledge can inform finding a logical solution. Staging Change focuses on contexts that are complex in nature, and the challenges that organizations face for which there is no known solution. Initial conditions enormously impact how effective any response is, and the relationship between cause and effect is only visible in retrospect. Complex challenges demand that organizations come up with adaptive responses, probing and testing in an iterative, experimental way to find viable new pathways to achieving their goals.

Please describe any complex challenge(s) your organization is currently facing, and the responses you are considering.



5. **Learning from previous attempts at innovation: 1 page** Based on research into the literature of innovation, discussion with arts leaders, and reflections in their own work in the field, EmcArts has developed the following working definition of organizational innovations, which is now being widely adopted in the field: organizational innovations are processes of change that result from a shift in underlying organizational assumptions, are discontinuous from current practice, and provide new pathways to creating public value and impact.

Please describe your organization's history of attempts to innovate. Who has been involved, how have potential strategies been tested, and what obstacles have you overcome? Include a description of at least one previous innovative strategy that failed and discuss what you learned from that experience.

6. **Assets and barriers in supporting innovation and adaptive work: 1 page**
- a. What practices in your organization specifically foster innovation? What practices specifically inhibit innovation or serve as barriers to it? In what areas of your operations do your adaptive capacities most need further strengthening?
  - b. Please describe the critical priorities of your organization over the next 24 months. Are any of these likely to reduce your ability to participate in the program?
  - c. Why do you think your organization is well suited to take part in the Staging Change program? How might your organization benefit?

## PART C: Declaration of Intent to Participate

Because identifying and addressing complex challenges demands alignment across stakeholders and among organizational leaders, participation in the Staging Change program requires consistent attendance at the Stage 1 online Workshops from a team of at least three individuals from your organization, representing Artistic, Executive, and Board leadership.

### Support of the Leadership

We understand that participation in Staging Change requires the support and active involvement of the Artistic, Executive, and Board leadership. We support this application and agree to participate in all of the Workshops.

Name and email address of the Artistic Director:

Name and email address of the Executive Director:

Name and email address of the Chair of the Board of Directors:

Applications are to be submitted in **electronic form only**.

Please email **one pdf file** of all parts to **[hdunford@metcalffoundation.com](mailto:hdunford@metcalffoundation.com)**.

Application deadline: **2pm on October 5, 2020**

After submitting your application, you will receive an email confirmation of its receipt. If you don't receive confirmation within three business hours of making your submission, please contact Foundation staff.