

PERFORMING ARTS PROGRAM

Staging Change

2018 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:

- improving economic livelihoods for low-income people in Toronto;
- building a low-carbon, resource efficient, and resilient Canada; and
- leveraging opportunities for new approaches and shared learning 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 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

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. They are:

Staging Change (information and application follow)

Leading and Learning

Performing Arts Internships

STAGING CHANGE

Staging Change 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.

The Metcalf Foundation is pleased to launch our new multi-year strategic funding program in the arts in collaboration with **EmcArts**, a New York-based social enterprise for adaptive learning and innovation across the arts and culture fields. Staging Change is the third iteration of this funding stream and the first time it is being offered in partnership with an external service provider.

At the core of the expertise that EmcArts brings to Toronto-based arts organizations, is the practice of adaptive change, which celebrates and advances organizational innovations as responses to challenges during times of rapid change in the non-profit arts sector. Why is Metcalf adopting this approach?

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. The “muscles” organizations exercise to promote stability now need to be balanced by equally strong muscles promoting adaptability.

Organizations have not in the past 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. 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.

To respond to these conditions, and 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.

Program Structure and Funding Parameters

Staging Change, delivered over a four-year period, is a staged or tiered funding stream: successful organizations move sequentially through the program, beginning with mandatory participation in Stage 1, followed by an application and assessment process for invitation to Stage 2, and then another combined application process for Stages 3 and 4.

Stage 1: A series of six hands-on **Workshops** exploring the real-life challenges of up to 15 Toronto-based organizations to build their capacity to adapt. Each organization will receive a **\$3,000 Participation Grant**. Stage 1 is led by the EmcArts team.

Stage 2: Onsite Organizational Coaching for up to 10 organizations to facilitate the adoption of new knowledge and practices while assessing and developing potential adaptive responses to a chosen challenge. Each organization will receive a **\$5,000 Experimentation Grant**. Stage 2 is led by the EmcArts team.

Stage 3: Incubating Innovation is a one-year process, for up to 5 organizations, to research, design and test a major new direction in response to a significant challenge. Each organization will receive up to a **\$25,000 Prototyping Grant**. Stage 3 is facilitated by the Staging Change Associate Facilitators – see below for further information – with mentorship support from the EmcArts team.

Stage 4: Scaling Innovation is an additional two years of funding and support for organizations who have successfully completed Stage 3 in order to scale the most promising prototypes. Each organization will receive up to a **\$75,000/year Scaling Grant**.

Stage 1: Hands-on Workshops (September – December 2018)

The series of six, four-hour Workshops will be for teams from each organization comprising of all three primary forms of leadership: artistic, administrative and volunteer (board). The Workshops, led by EmcArts staff and guest faculty, together constitute a curriculum in innovation and adaptive change, grounded in the situations and real issues of each organization. Participants will learn 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.

Stage 2: Individualized Onsite Organizational Coaching (April – June 2019)

Upon successful completion of the Workshop Series, participants will have the option to apply to Stage 2. Designed to leverage the learning from the Workshops, the Onsite Coaching visits will allow participating organizations to further explore their adaptive ideas, approaches, and strategies. Additionally, participants will enroll other organizational stakeholders to create an expanded Working Group in support of the identified new approaches. Over the course of three, half-day Coaching visits, each Working Group will begin to develop an adaptive response, and will test its emerging strategy by designing and carrying out “small experiments with radical intent.” The intention is to guide each organization in significant self-reflection — as a valuable exercise in itself — alongside early experimentation as it prepares to plunge into an innovation project.

Stage 3: Incubating Innovation (September 2019 – August 2020)

Upon successful completion of the Onsite Coaching, participants may apply for support to take a deep dive into a major adaptive response to a complex challenge. Incubating Innovation offers a full immersion in an innovation project, with the larger aim of leveraging significant increases in capacity and, potentially, organizational transformation. Participating Incubating Innovation teams will receive multiple visits from a Staging Change Associate Facilitator over the course of nine months; will participate together in a weeklong, intensive retreat; and will test and refine their innovations through public prototypes.

Stage 4: Scaling Innovation (Year 1: September 2020 – August 2021 and Year 2: September 2021 – August 2022)

In the final stage of the program, successful applicants from Stage 3 will receive two years of significant funding to support the further development and scaling-up of tested innovation initiatives. The idea behind these grants is to provide more extended underwriting for participants to expand promising initiatives and develop sustainable revenues for their ongoing success.

Staging Change Associate Facilitator Program

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 change facilitators who will partner with us to grow and deliver future versions of this multi-year funding program in the arts.

In tandem with the launch of Staging Change, Metcalf is inviting local facilitators, consultants and senior administrators — leaders who are interested in expanding their understanding of how to steward and support adaptive change within the context of this new program — to apply to become a **Staging Change Associate Facilitator**. Up to eight Toronto-based individuals will be selected, through an application and interview process, to attend the EmcArts Workshop Series, to shadow the Onsite Coaching and to undertake Associate-specific coaching with EmcArts staff. Participation in the Associate Facilitator Program confirms eligibility to be hired as a lead facilitator in the Incubating Innovation and Scaling phases of Staging Change. Associate Facilitators will be compensated for their participation in all stages of the program. A Staging Change Associate Facilitator Prospectus, outlining the program goals, curriculum, time commitment, and compensation, will be released on March 16, 2018. Those interested in receiving a copy of the prospectus should contact Performing Arts Program Director Michael Trent directly.

Eligibility, Readiness, and Suitability

Applicants to Staging Change **must**:

- be professional theatre, dance, music, or opera organizations (including companies, festivals, professional training institutions and service organizations);
- maintain a professional staff (organizations of all sizes are encouraged to apply; the minimum required staff capacity is 1 FTE);
- 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;
- have a current, valid charitable registration from the Canada Revenue Agency; and
- not be current grantees in CrSI 2015, 2016, or 2017.

We encourage equity-seeking organizations to consider this opportunity.

Program Schedule

Stage 1:

September 6, 2018:	Workshop #1 (9am-1pm)
September 27, 2018:	Workshop #2 (9am-1pm)
October 25, 2018:	Workshop #3 (9am-1pm)
November 8, 2018:	Workshop #4 (9am-1pm)
November 29, 2018:	Workshop #5 (9am-1pm)
December 11, 2018:	Workshop #6 (9am-1pm)

Stage 2:

April 2019:	Coaching Working Group #1
May 2019:	Coaching Working Group #2
May 2019:	Execution of “Small Experiments in Radical Intent”
June 2019:	Coaching Working Group #3

Stage 3:

September 2019 – January 2020	Incubating Innovation Phase 1
February 3 – 7, 2020	Incubating Innovation Phase 2: Retreat
March – September 2020	Incubating Innovation Phase 3

Stage 4:

September 2020 – August 2021	Year 1 Scaling Grant
September 2021 – August 2022	Year 2 Scaling Grant

Important Dates & Deadlines

Associate Facilitator Prospectus released	March 16, 2018
information session with EmcArts	April 23, 2018, 1–4pm
application deadline (Stage 1 only)	June 11, 2018, 2pm
notification of participation	June 27, 2018

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.

Applications for Stages 2, 3, and 4 will be announced at a later date but are limited to Stage 1 participants only.

Please note that, at this time, the Foundation plans to offer Staging Change every two years: a second cohort of Staging Change will begin in 2020, with no intake in 2019.

Application Resources

On Adaptive Change in the Arts

- <http://www.giarts.org/article/entering-upon-novelty>

Innovation Stories from EmcArts' Past Program Participants

- <https://www.artsfwd.org/alutiiq-museum/>
- <https://www.artsfwd.org/teatro-publico-de-cleveland/>
- <https://www.artsfwd.org/off-center-the-jones/>

Funding Decision

Applications will be reviewed by the Foundation's staff. 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

2018 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 or 416-926-0366 x 225.

Note: The following section is available in a [Word version](#) at 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 – obvious, complicated, complex, and chaotic. Of these, two produce known or knowable challenges: when the context is obvious, 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 Phase 1 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**.

Application deadline: **2pm on June 11, 2018**

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.