

2024 METCALF PERFORMING ARTS PROGRAM

Strategic Experimentation Fund (SEF)

April 23, 2024 | YWCA Toronto

— AGENDA

- Who we are and what we do: Metcalf and the Performing Arts program
- State of the sector
- Booster Fund + Q&A
- Strategic Experimentation Fund + Q&A
- Recording

— ALL ABOUT METCALF

- Family foundation, founded in 1960
- Invest in people, ideas, and actions to build a just, healthy, and creative society
- Work in three areas:
 - **Environment**
 - **Inclusive Local Economies (poverty reduction)**
 - **Performing Arts**

— PERFORMING ARTS PROGRAM

**To support the vitality, viability, and
transformational efforts of the performing arts
sector in Toronto and Ontario**

— PERFORMING ARTS PROGRAM

Three Strategies:

Individuals

1. INTERNSHIPS
2. JOHANNA METCALF PERFORMING ARTS PRIZES

Organizations

1. BOOSTER FUND
2. STRATEGIC EXPERIMENTATION FUND

Sector

1. NEW PATHWAYS

— STATE OF THE SECTOR

- How did we get here?

- Four disruptions

1. Pandemic
2. Cultural shifts and search for equity
3. Digital revolution
4. Climate crisis

- Exacerbation of existing fault lines

— STATE OF THE SECTOR

- What are we noticing today?

1. Audience return rates and cultural consumption behaviours
2. Demographic shifts
3. Inflation and the cost of doing business
4. Artist and arts worker precarity
5. Growing funding gap + redistribution practices
6. Understanding and then meeting the cultural needs of people who live in our communities
7. Decrease in the purchase on the public imagination
8. Decrease in building critical thinking and cultural competence in youth

— STATE OF THE SECTOR

- How is Metcalf responding?

1. Continue to place a significant portion of our resources within arts organizations
2. Strategic and hyper-specific opportunities – not project, not operational
3. In 2024, two new initiatives to meet a more expansive list of needs
 1. Booster Fund
 2. Strategic Experimentation Fund (SEF)

APPLICANT ELIGIBILITY

Criteria	Booster	SEF
Professional opera, theatre, dance, or music organization plus...	Yes	Yes
Professional Staff	Yes	Yes, minimum 2 FTE
Location	City of Toronto but...	City of Toronto but...
History	3 years	3 years
Charitable status	Required	Required

— STRATEGIC EXPERIMENTATION FUND (SEF)

**The Strategic Experimentation Fund encourages
Toronto performing arts organizations to test
new approaches to deepen the impact of their
artistic ambitions**

— STRATEGIC EXPERIMENTATION FUND (SEF)

- Single spring deadline: **June 24, 2024 by 2pm ET**
- Orgs can apply for both Booster and SEF in 2024
- Next in a long line of multi-year, strategic interventions (SI, CrSI, SC)
- Start time: after notification in early October 2024
- Expected duration of phase 1 : 6-10 months

— STRATEGIC EXPERIMENTATION FUND (SEF)

- SEF Design Principles

1. Unique problem statement
2. Identify early responses – hunches
3. Iterative experimentation – R&D methodology
4. Distributed leadership
5. Cohort support

— STRATEGIC EXPERIMENTATION FUND (SEF)

- How to approach the reflection and application process for phase 1:

1. Identify your unique challenge:
 1. Who
 2. Name it in 20 words or less
2. Determine one or two potential responses – your hunches
3. Think about ways to test the potency of your potential responses – what do you want to learn?
4. Design your experiments/research/data gathering

— STRATEGIC EXPERIMENTATION FUND (SEF)

Hypothetical case-study: mid-sized dance company in Toronto

1. Identify our unique challenge: to counter declining ticket revenue
 1. Who: me, ED, board member, box office staff, long-time audience member, new audience member
 2. Name it in 20 words or less: 3 hours together, specified the challenge “to better meet the needs of the 18-35 demographic”

— STRATEGIC EXPERIMENTATION FUND (SEF)

Hypothetical case-study: mid-sized dance company in Toronto

2. Determine one or two potential responses – our hunches
 1. What if we adopt best practices from other dance companies
 2. What if we engage the 18-35 demographic to better understand their needs and how to meet them

— STRATEGIC EXPERIMENTATION FUND (SEF)

Hypothetical case-study: mid-sized dance company in Toronto

3. Think about ways to test the potency of your potential responses – what do you want to learn?
 1. How are other companies meeting the needs of the 18-35 demographic?
 2. How does the 18-35 demographic want to spend their non-work time?

— STRATEGIC EXPERIMENTATION FUND (SEF)

Hypothetical case-study: mid-sized dance company in Toronto

4. Design your experiments/research/data gathering
 1. Consultant will do desk research to identify all the strategies used by dance, theatre, and music orgs of similar size
 2. Consultant/staff will hold focus groups with representatives from the 18-35 demographic

STRATEGIC EXPERIMENTATION FUND (SEF)

- Budget (you must use our template). This supports the hypothetical case-study, above.

ITEM		REVENUE	EXPENSE
Metcalf grant		\$33,800	
From other sources			
HR support			\$5,000
Experimentation costs	Best practices		\$8,000
	Focus group		\$10,000
Data, evaluation etc.			\$3,000
Sub-total			\$26,000
Unallocated (20%)			\$5,200
Admin (10%)			\$2,600
TOTAL		\$33,800	\$33,800

— STRATEGIC EXPERIMENTATION FUND (SEF)

- **Your application has been approved – what happens next?**
 1. Execute the experiments/research and gather the data
 2. Analyze data – what did you learn?
 3. Plan uses for your unallocated resources

— STRATEGIC EXPERIMENTATION FUND (SEF)

- **Your application has been approved – what happens next?**

4. Execute activities with unallocated resources

5. Sense-making and decide next steps

1. Strong indicators suggest ready to amplify response – apply for phase 2 innovation capital
2. Moderate indicators suggest more or new testing is necessary, reapply for phase 1
3. Weak indicators suggest abandon response and start reflection again, reapply for phase 1

— STRATEGIC EXPERIMENTATION FUND (SEF)

- Ineligible costs
 1. Ongoing operating expenses that are unrelated to the proposed project
 2. Debt repayment, endowments, and capital expenses
- Include 2-page operating budget for current year
- Include most recent financial statements
- Cohort support
- Budget envelope (\$440,000) max request (\$40,000)
- Application resources available online