

# PERFORMING ARTS PROGRAM

## Strategic Experimentation Fund

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### 2026 Application Guidelines – Phase 1

#### **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:

- advancing economic dignity and prosperity for low-income people and communities in Toronto;
- working with leaders across Canada to safeguard lands and waters for generations to come; and
- supporting individuals, organizations, and field building in the performing arts to meet the cultural needs of Canadians.

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 nonprofit 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 grantmaking 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.

In response to this dynamic environment, we support individuals, organizations, and field building in the performing arts to meet the cultural needs of Canadians.

### Strategic Experimentation Fund (SEF)

*The Strategic Experimentation Fund encourages Toronto performing arts organizations to test new approaches to deepen the value they bring to their communities.*

For over twenty years, Metcalf has provided the performing arts sector with multi-year strategic granting initiatives. In its design, SEF continues to celebrate our long-held values of ambition, specificity, invention, and learning. Successful grantees, then and now, are those who are focused, compelling, embrace intentional change, and revel in active experimentation. In this spirit, SEF encourages organizations in this initial phase to **prioritize finding something out rather than making something new.**

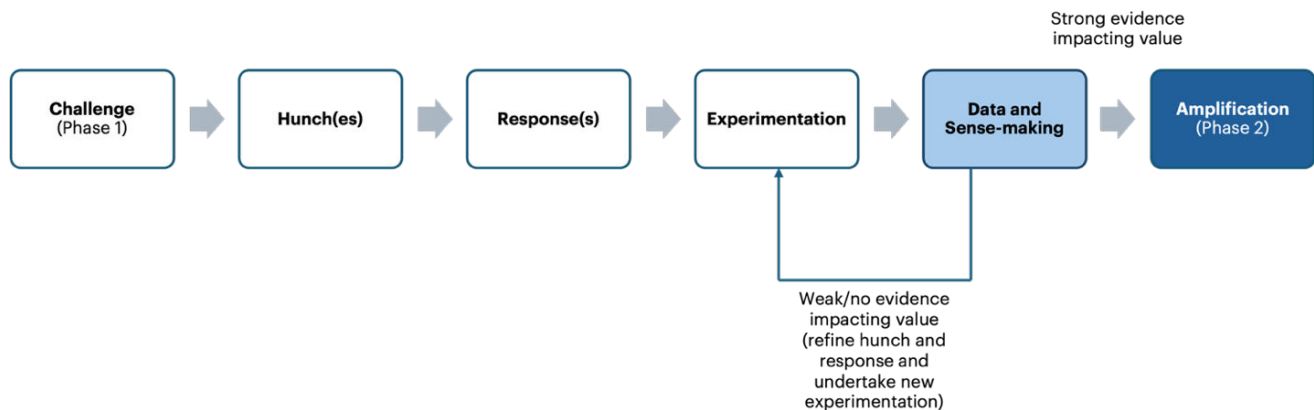
Metcalf recognizes the remarkable work underway in the sector despite the overwhelming disruptions it has faced over the last few years. As performing arts organizations strive to remain not only sustainable but vital, they are facing pressure to invent new strategies that go beyond business as usual. SEF supports these transformational efforts that rely less on past experience or external expertise and more on iterative experimentation — and the learning that comes with it — as organizations search for meaningful ways to increase the value they bring to their communities.

Today, dramatic shifts in the operating environment have placed radical new demands on arts organizations. Factors such as generational and demographic shifts, as well as the need for new forms of resource development and re-imagined business models, have asked the sector to re-examine the status quo in all its forms. To work within this rapidly changing environment, each organization must find its own unique balance between stability and innovation. For those who are ready, SEF encourages applicants to carve out time and space to consider their value proposition, follow their hunches, and learn about promising directions before committing core operational resources.

### SEF Structure

SEF encourages strategic approaches to an organization's development, capacity building, and problem solving — in all aspects of operations including artistic, administrative, and audience-building functions, among others. We expect that applicants will focus on their specific organizational needs rather than on the broader sector.

This diagram illustrates the overall SEF journey:



**Challenge:** a self-identified and concise articulation of a significant obstacle putting your organization’s impact at risk.

**Hunch:** an informed gut feeling or intuitive sense that something is worth exploring even when you don’t yet have evidence or a clear rationale to back it up. Following a hunch means noticing an emerging possibility or idea your organization wants to test, *before* you can prove it, fully justify it, or devote significant resources to it.

**Response:** an initial idea or action your organization chooses to test based on your hunch(es). Your best initial idea for how you might address the challenge.

**Experimentation:** repeated, iterative testing to understand the potency of the response. What do you want to learn? What are you going to do to learn this?

**Data collection and sense-making:** how are you going to capture the experiment(s)’ data and make sense of the results?

We encourage the use of cross-functional, multi-constituent teams that are internal and external to the organization in all aspects of this work rather than relying on an individual leader.

## SEF Application

**Phase 1 Experimentation** (this application): Applicants will determine their unique challenge, outline their hunch(es), propose some initial responses, and then design iterative experiments to test their hypothesis. Applicants will also outline their data gathering activities and the sense-making process they will use to help them gauge the potency and promise of their initial hunches. This first phase of activity can begin once successful grantees are notified in early October 2026 and will likely take 6–10 months to execute.

**Phase 2 Amplification** (future applications): Once organizations have undertaken Phase 1, they have three options to consider: opt out of the initiative; undertake another cycle of Phase 1 activity; or move into an amplification process to bring the promise of the strategy closer to core operations.

## Phase 1 Funding Parameters

Phase 1 applicants can request **up to \$40,000**. Successful projects will be funded at the amount requested, but the grant may be reduced in cases where expenses are deemed ineligible.

The underlying design of SEF acknowledges that applicants, within Phase 1, will be determining the next level of action based on the learning that emerges from their early experiments. As a result, all budgets **must include** an unallocated amount of 15% of the total budget request toward late-stage Phase 1 activities that are unknowable at the time of the original application. Successful grantees will be required to discuss their intentions with Metcalf before using this unallocated amount.

Eligible expenses include:

- External human resources needed to support the design and implementation of the experiments.
- Costs associated with the direct implementation of the experiments.
- Costs associated with the data collection, analysis, and sense-making of the experiments.
- Administration fee up to 10% of the total budget request.

Ineligible expenses include:

- Ongoing operating expenses that are unrelated to the proposed project.
- Debt repayment, endowments, and capital projects.

Based on the above categories, a \$40,000 request could consist of the following:

- Admin fee: \$4,000.
- Unallocated amount: \$6,000.
- Experimentation/research/data gathering: \$30,000.

## Eligibility

Applicants to SEF **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 minimum staff capacity is two FTE);
- be based in the City of Toronto (organizations 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.

Please note: organizations who are currently participating in **SEF 2024 are not eligible** to apply.

## Important Dates & Deadlines

Zoom Q&A drop-in sessions	<a href="#">May 12, 19, and June 10, 2026</a>
Application deadline	<b>July 21, 2026 by 2:00pm ET</b>
Grant notification	October 8, 2026

Metcalf is unable to consider late or incomplete applications for funding. **All materials must be received by the time and date listed above.**

## Application Resources

### On the future of the sector:

The following writings are from David Maggs, Metcalf's Fellow on Arts and Society, who has been reflecting on the future of the sector for the past four years. We invite applicants to engage with his critical thinking and interviews with sector leaders as they consider their own futures in these challenging times.

<https://metcalffoundation.com/publication/art-and-the-world-after-this/>  
<https://metcalffoundation.com/david-maggs-fellow-on-arts-and-society/>

### On experimentation:

Iterative experimentation, one of the foundational practices in adaptive changemaking, was an integral component of Metcalf's precursor to SEF called Staging Change. SEF is particularly informed by the Small Experiments with Radical Intent (SERI) component of the Staging Change initiative. Two participating organizations of Staging Change share their SERI experiences in this article:

<https://metcalffoundation.com/metcalf-story/staging-change-participants-engage-in-small-experiments-with-radical-intent/>

## Assessment of Applications

Applications will be reviewed by Metcalf, assisted by an advisory panel from the performing arts community. Funding decisions will be made by the Metcalf board and decisions are final.

Reviewers will want to understand how this investment will create meaningful change for the organization regarding its self-identified challenge. The strongest applications will:

- clearly articulate a current challenge;
- identify one or more proposed responses to that challenge;
- outline the design of experiments that will help the applicant determine the potency of their responses; and
- provide appropriate data and learning strategies to support the sense-making of the outcomes of the experiments.

## Strategic Experimentation Fund 2026 Phase 1 – Application Requirements

Please contact Performing Arts Program Director Michael Trent, at [mtrent@metcalffoundation.com](mailto:mtrent@metcalffoundation.com), if you have any questions or if you would like to meet online to discuss your application in advance of making a submission. We are also offering Zoom drop-in sessions on [May 12, 19, and June 10, 2026](#).

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

### PART A: General Information – maximum ½ page

Name of Organization:

Primary Contact Name and Position:

Mailing Address:

Telephone:

Email:

Website:

Charitable Registration Number:

Amount Requested:

Anticipated Project Start Date and End Date:

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

2-4    5-7    8-12    13-20    21+

Description of the challenge your organization is facing in 20 words or less:

### PART B: Application Text – maximum 6 pages, with a suggested maximum length for each section below (do not start a new page for each section)

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

1. Who do you serve? **1/3 page**
2. What are the core activities of your organization? **1/3 page**
3. What is your vision for success for your organization? **1/3 page**
4. Please describe the challenge your organization is currently facing. What makes it the most important thing you need to address at this time? In what ways have you tried to address it in the past and what did you learn from your efforts? **1 page**
5. Outline your hunch(es) and proposed response(s) to your challenge. **Up to 1/2 page**
6. Provide details of the experiment(s) you would like to undertake to test the potency of your proposed response(s). **Up to 1 ½ pages**
7. Who has/will participated/participate in the design, implementation, and sense-making of your experiments? **1/2 page**
8. What specifically do you want to learn as a result of your experimentation activities? **1/2 page**
9. What data will you gather to help you understand what you are learning? **1/2 page**

## PART C: Budgets and Financial Information

1. Complete the project budget template found at: <https://metcalffoundation.com/downloads>. Revenues and expenses should be equal. If your project budget is over \$40,000, please indicate where the additional funding is coming from.
2. Include the organization's current operating budget (condensed, no more than two pages, not from CADAC).
3. Include the organization's most recent financial statements.

Please email **one pdf file** with all materials to **[grants@metcalffoundation.com](mailto:grants@metcalffoundation.com)** by **July 21, 2026, at 2:00pm ET**.  
Please note that we are unable to consider late or incomplete applications.

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 Heather Dunford at [grants@metcalffoundation.com](mailto:grants@metcalffoundation.com).