

Staging Change

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Alliance Française

Staging Change

Information Session Presenters

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Managing Director, EmcArts

Staging Change

Metcalf's Mission...

To work with Canadians to build a just, healthy, and creative society

...is met in three program areas:

- Social and economic justice
- Sustainability in the environment
- New approaches and shared learning in the performing arts

Staging Change

Multi-year Strategic Funding Programs in the Performing Arts at Metcalf

Strategic Initiatives

(2001-2012)

Creative Strategies Incubator

(2013-2020)

Staging Change

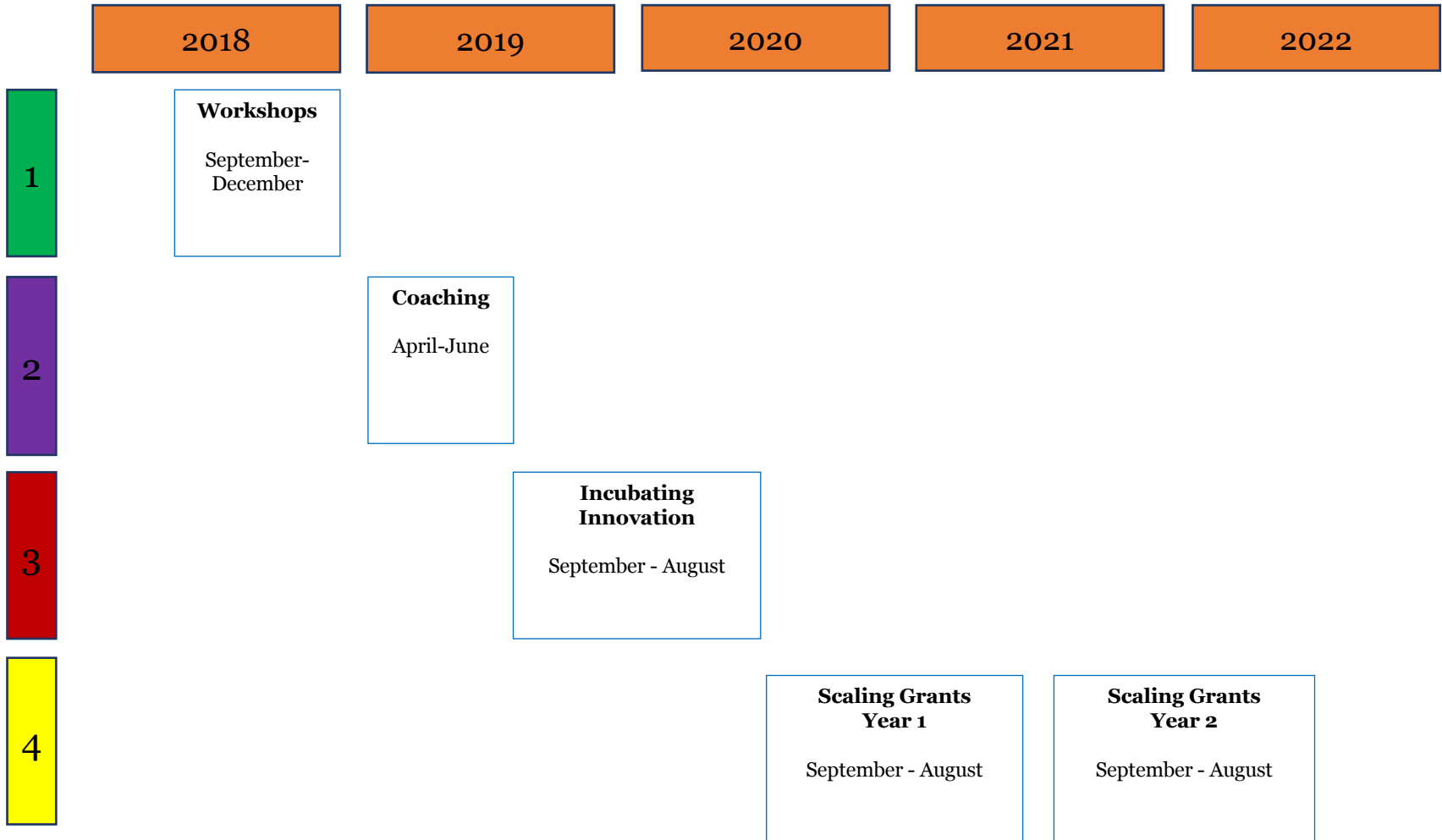
(launched in 2018)

Staging Change

Metcalfe's interest in developing *Staging Change*

1. Design principles of Adaptive Change
2. Tiered Funding approach
3. Associate Facilitator Training opportunity

Staging Change



Today's gathering

- ✧ An introduction to EmcArts' work in adaptive change
- ✧ Overview of the *Staging Change* program and the Associate Facilitator Training Initiative
- ✧ Q & A and application system

Turn-and-talk

- ✧ *Is there a fundamental assumption about your work that you are now beginning to question?*
- ✧ *If so, what evidence contradicts your old assumption?*



EmcArts

EmcArts works alongside individuals, organizations, and communities as they take on their most complex challenges.

- *We help build local capacity for innovation and adaptive change in the arts and the wider nonprofit sector.*
- *We create the space and conditions for our partners to take on complex challenges.*
- *We deeply integrate artists and artistic practices into change efforts.*

EmcArts programs

National Innovation Labs in the Arts

- ✧ Performing Arts/Museums *(42 organizations)*
- ✧ Arts Development Agencies *(14 agencies)*

New Pathways for the Arts/Social Sector

- ✧ *Multiple cities across the US and Canada (300+ groups)*

Arts Leaders as Cultural Innovators

- ✧ *Individual adaptive leadership development (5 sites)*

Community Innovation Labs

- ✧ *Integrating the arts into rigorous processes of local system change (5 pilots in 2015 - 18)*

www.ArtsFwd.org

- ✧ *“Next practices for arts and culture leaders”*

A New Era for the Arts and Culture Sector

An Era Structured for Growth

- In Funding and Contributions
- In Audiences and Revenues
- In Program Quality
- In Number of Providers

Proposition: Excellence and Scarcity

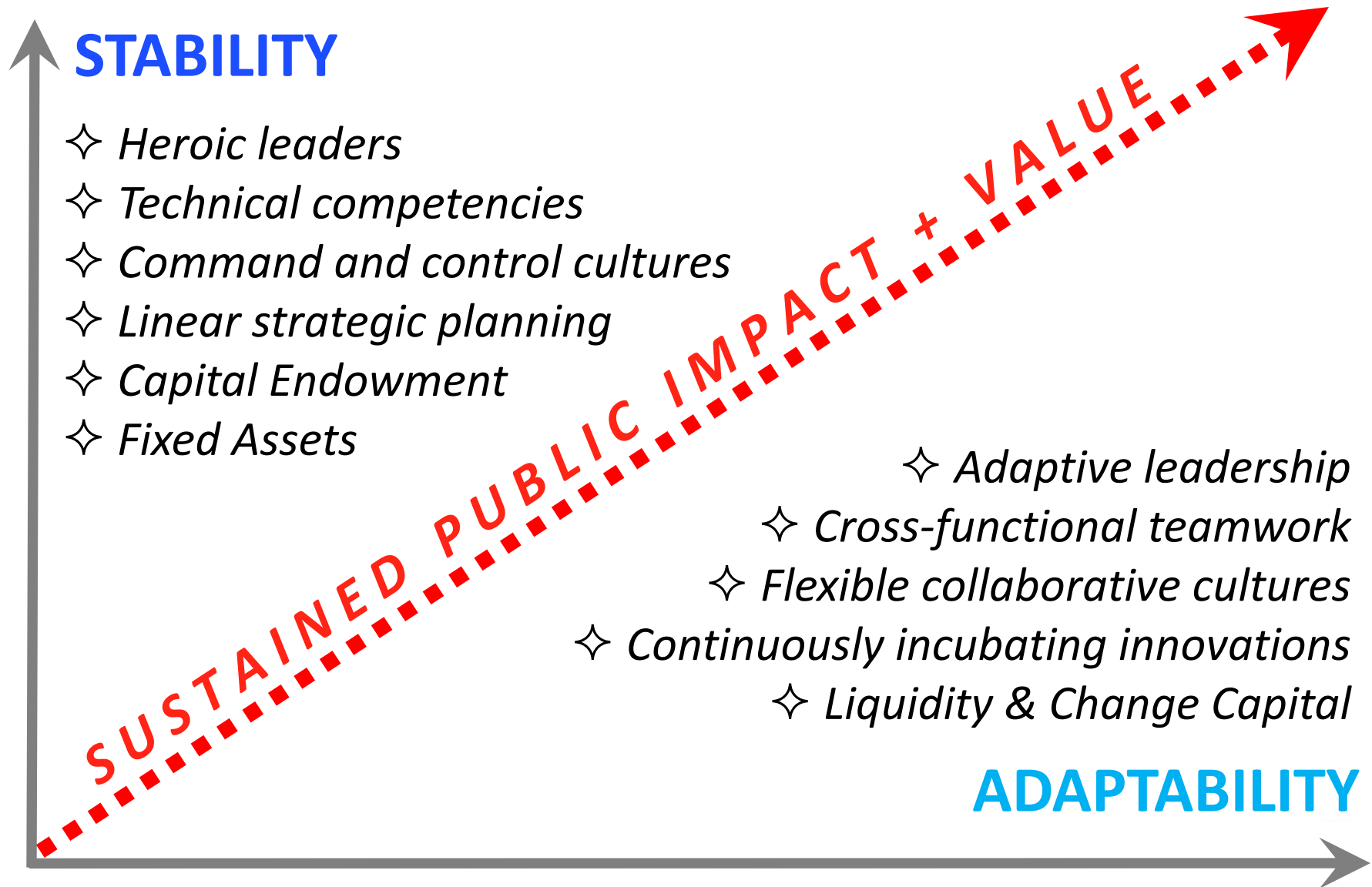


An Era Structured for Resilience

- Operate in complex adaptive systems
- Engage with community's creative potential
- Develop open, nimble structures
- Cultural professionals as enablers

Proposition: Abundance and Intimacy

Organizational capacities: A New Balance



Shifting dynamics, shifting roles

FROM.....

Hierarchies

Hub & Spoke

Leader as

Competitive Hero

Strategic Planning

TO.....

Networks

Movement Building

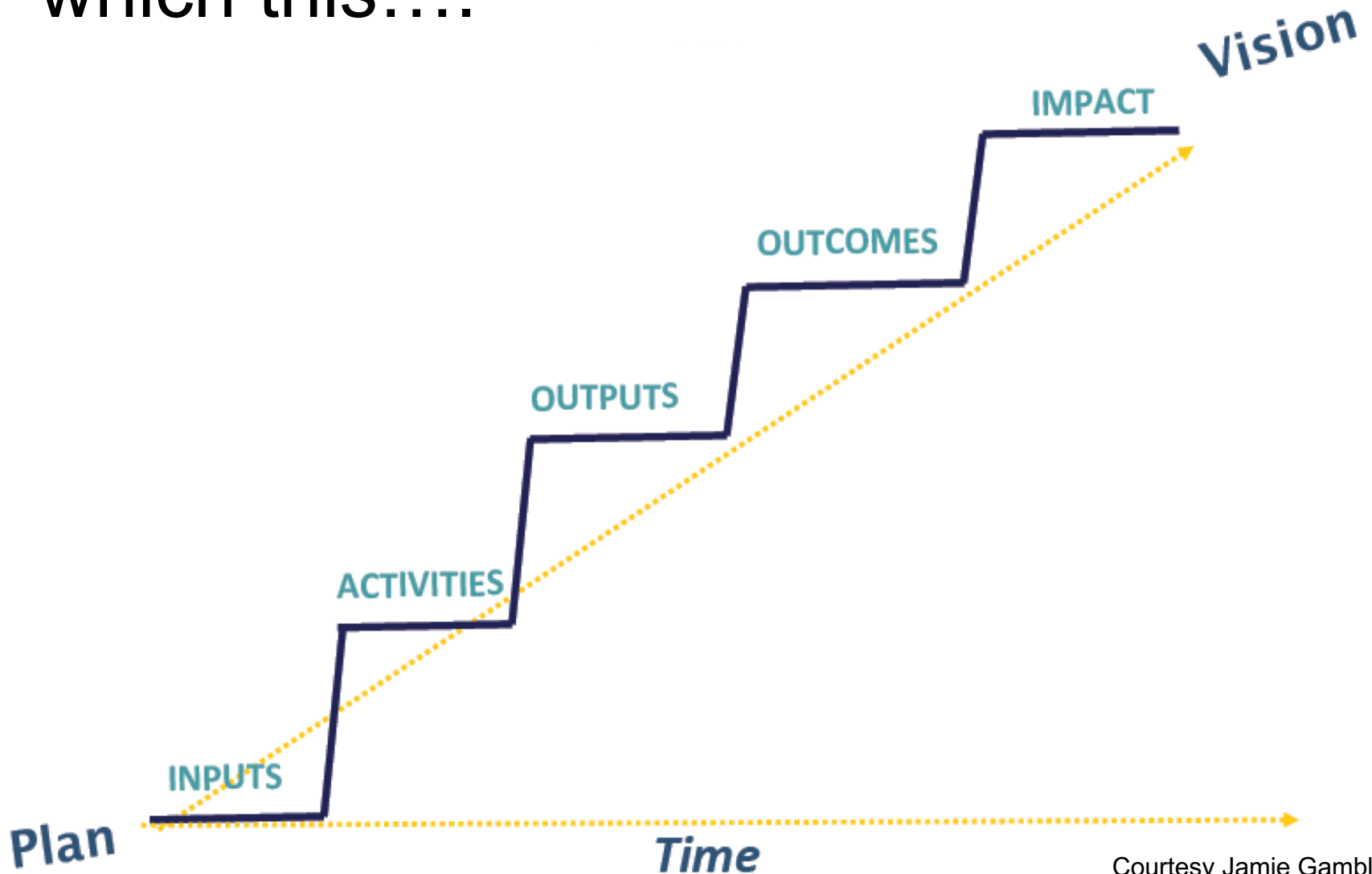
Leader as

Collaborative Host

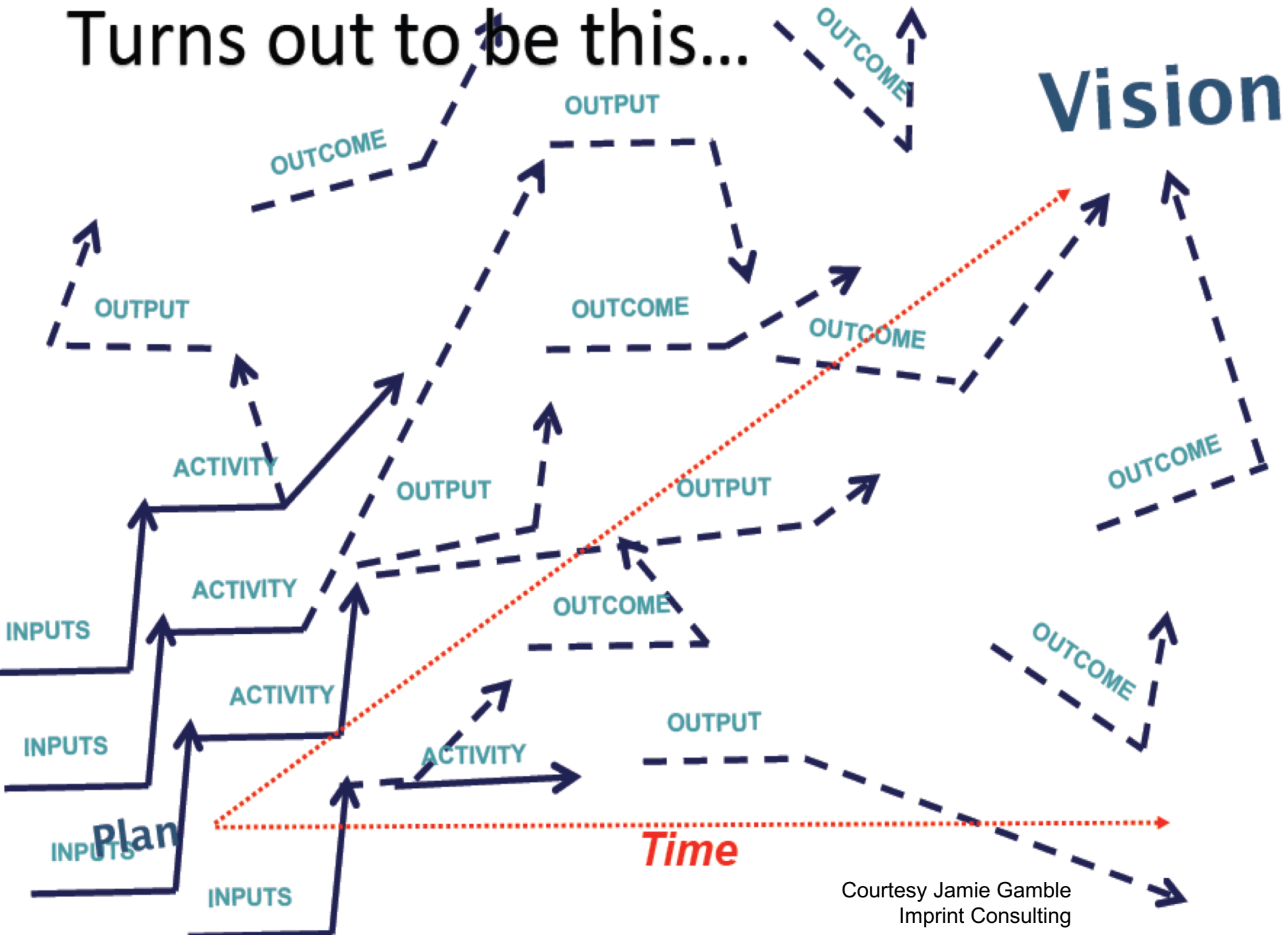
Navigating Complex

Adaptive Systems

Complex situations are ones in which this....



Turns out to be this...







Graem Whyte:
Venue for Advanced Conflict Resolution, 2011

*Responding to
Challenges in
Different Contexts*

Complex



Complicated



disorder



Chaotic



Obvious

The Cynefin Framework

- Diverge from existing strategies
- Let go of old assumptions
- Work with non-experts
- Distribute leadership
- Probe + experiment
- Design for quick learning

Complex



*Emergent
Practice*

**Complicated
(Knowable)**

Cause Effect

*Expert
Analysis*

- Improve existing strategies
- Call in experts
- Develop a strategic plan
- Limited number of good practices

Disorder

- Act immediately to find connections
- Tolerate sustained ambiguity
- Privilege intuition over logic

Chaotic

Cause ≠ Effect

*Stabilizing
Actions*

**Obvious
(Known)**

Cause = Effect

*Best
Practices*

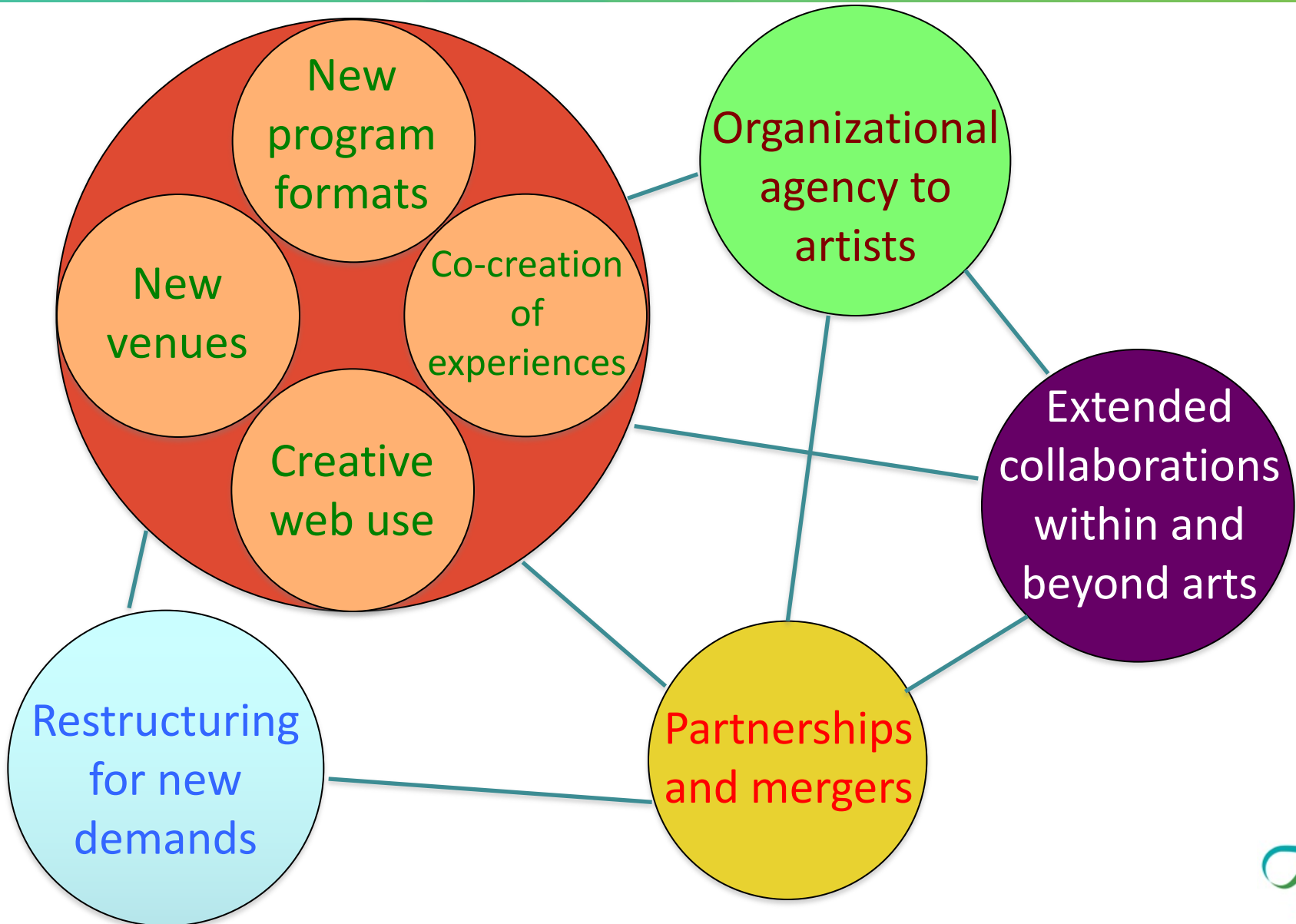
- Align with existing solutions
- Reinforce authority
- Small number of best practices

Identifying Complex Challenges

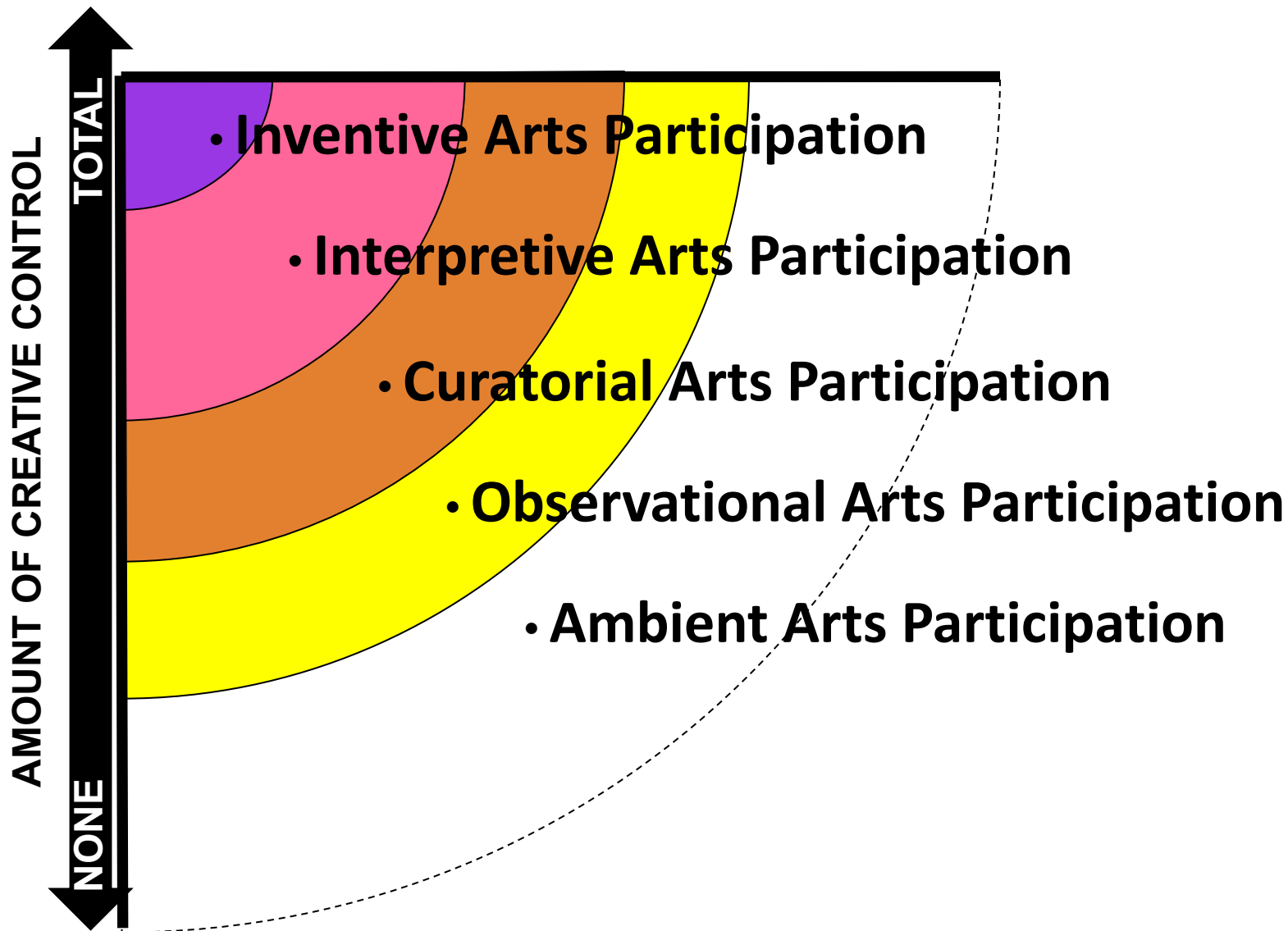
✧ *What challenges do we face that have persisted despite us trying many strategies to address them? And where there's no expert we can turn to?*

*Adaptive Change in
Practice:
Addressing Challenges
with New Approaches*

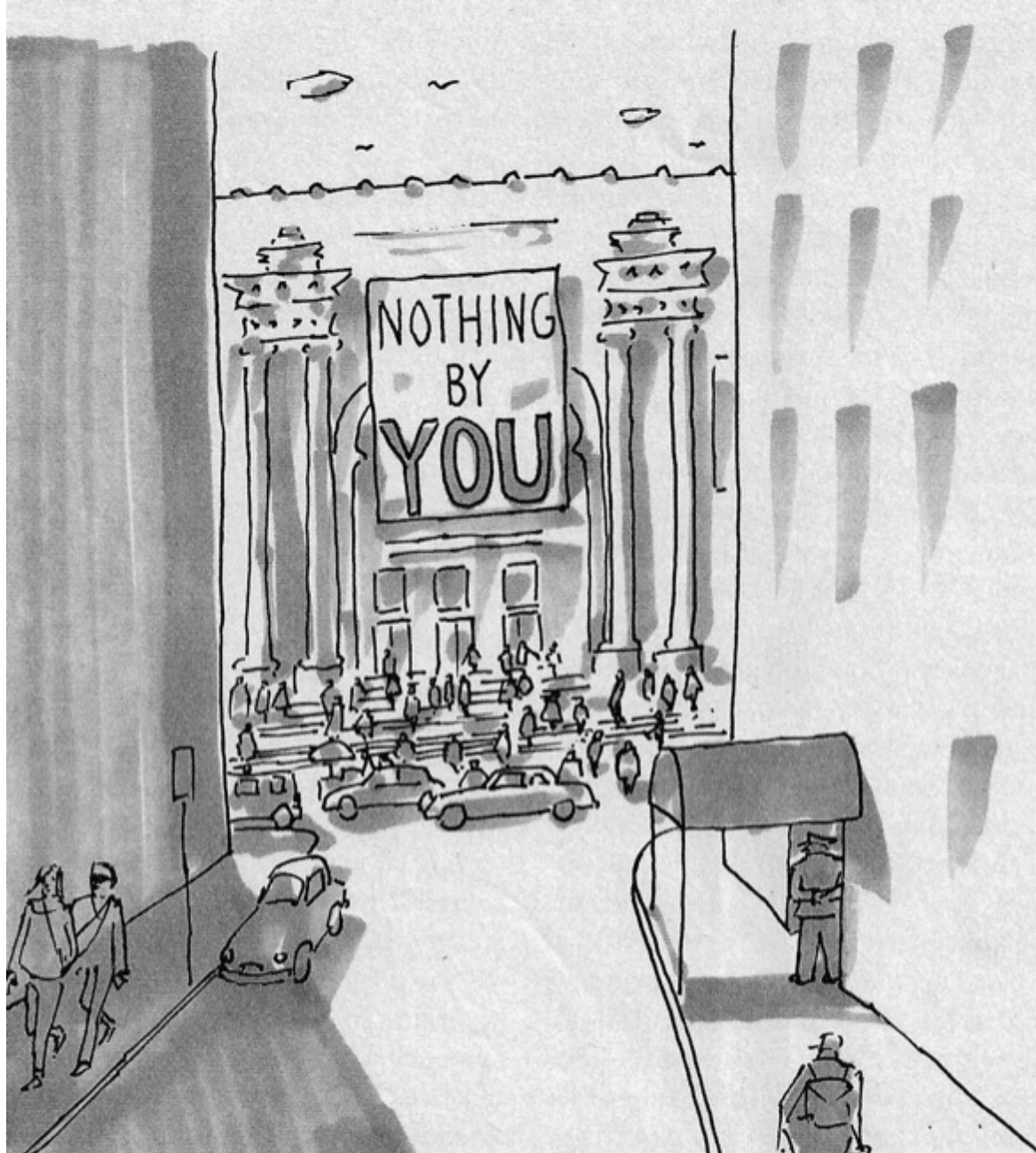
Areas of innovative practice



Expanding Modes of Arts Participation



Courtesy of Alan Brown, WolfBrown



How many organizations unconsciously fly this banner over their buildings? Or do so with pride?

A Working Definition of Organizational Innovation for Not-for-Profits

Innovations are processes of organizational change that:

1. result from a shift in underlying organizational assumptions
2. are discontinuous from current practice
3. provide new pathways to creating public value and impact

Performing Arts Center of Los Angeles County



Active Arts

Systematizing Adaptive Work

Research on Organizational Innovation

Not-for-profits should embrace innovation as a permanent part of their core competencies....

*Kellogg Foundation report, 2008:
Intentional Innovation*

Stanford Social
Innovation Review
2012

Pushing innovation based on simple recipes and success factors is still the prevailing dogma.... The not-for-profit sector should treat innovation as a process, not primarily as an outcome.

Two types of Response

TECHNICAL

- ✧ *Improve current strategies*
- ✧ *Use expert analysis*
- ✧ *Apply “best practices”*

ADAPTIVE

- ✧ *Diverge from current strategies*
- ✧ *Let go of ingrained assumptions*
- ✧ *Discover “next practices”*

Staging Change: Design and Benefits

Goals of the *Staging Change* program

- ✧ To advance the achievements of leading performing arts organizations in Toronto
- ✧ To strengthen the capacity of participants to pro-actively innovate + adapt
- ✧ To enable the design and testing of significant organizational innovations
- ✧ To support Toronto-based consulting practitioners in delivering “adaptive assistance”

Staging Change activities

Stage 1: A series of 6 interlinked **Workshops**
(teams from up to 15 organizations)

Associate Facilitator training

Stage 2: On-site **Organizational Coaching**
(up to 10 organizations)

Stage 3: ***Incubating Innovation*** process
(cohort of up to 5 organizations)

Stage 4: ***Scaling Innovation***
(multi-year grants to ***Incubating*** graduates)

Design of the *Staging Change* program

GROUP LEARNING AND SHARING

Workshops for teams from 15 organizations together

BUILDING ADAPTIVE CAPACITY

On-site coaching with each of 10 organizations

INCUBATING AN INNOVATIVE APPROACH

Deep dive into adaptive work for 5 organizations

SCALING NEW STRATEGIES

Embedding adaptive work in the culture

EMCARTS FACILITATION TEAM

LOCAL ASSOCIATE FACILITATORS

2018

2019

2020 - 2022

Design of the *Staging Change* program

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PARTICIPATION GRANTS (\$3,000)

GRANTS for multiple experiments (\$5,000)

GRANTS for repeated prototyping (\$25,000)

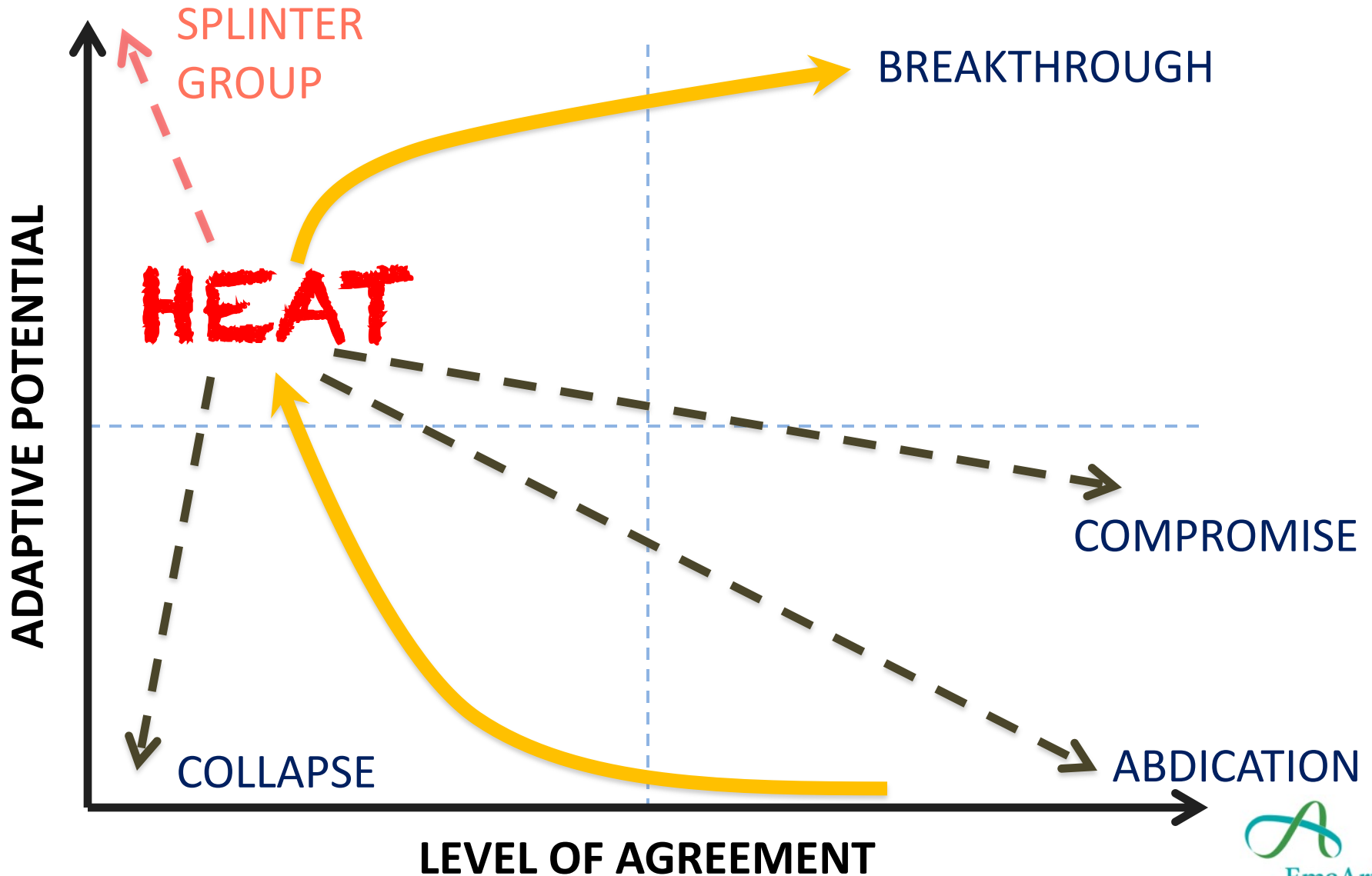
Multi-year SCALING GRANTS (up to \$75,000 a year for 2 years)

2018

2019

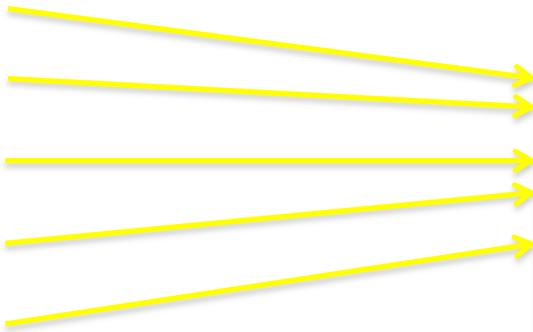
2020 - 2022

Trajectory of adaptive team dynamics

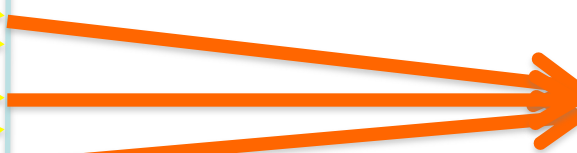


Investing in Innovation

Stages 1 & 2 (Design/ Research/ Small Experiments)



Stage 3 (Repeated Prototyping/Assessment)



Stage 4 (Execution/Scaling)



Investment Strategy:

Low investment in lots
of ideas

Managed via staff and
operating resources

Sample funding range:

\$0 - \$1,000 per idea

Short-term medium-level
investment in reduced number
of emerging strategies

Online project financing,
special grants/contributions,
early revenue streams

\$5,000 - \$25,000 per prototype

High-level of investment in a few
tested initiatives, tapering over time

Up to 3-year investments from a
Strategic Innovation Fund, regular
revenue streams

\$50,000 - \$150,000 per initiative

The *Staging Change* Workshop Series

- ✧ Six workshops, 3 weeks apart, each lasting 4 hours (September – December 2018)
- ✧ With leadership teams from the group of up to 15 leading performing arts organizations
- ✧ An innovation curriculum grounded in the real challenges of each organization
- ✧ Balances content from EmcArts with peer-to-peer learning from experience
- ✧ Supported by participation grants of \$3,000

On-site Organizational Coaching

- ✧ For up to 10 organizations from the Workshop Series
- ✧ 3 half-day visits by an EmcArts coach over 6 months (April – June 2019)
- ✧ Go deeper on Workshop content and enroll a larger Working Group
- ✧ Design and carry out “small experiments with radical intent”
- ✧ Supported by \$5,000 experimentation grants

Incubating Innovation process

- For up to 5 organizations from Organizational Coaching
- For organizations that are ready to design and test a major new approach
- A 12-month facilitated framework in three distinct phases, from September 2019
- Involves exploration of challenges, design and repeated testing of new strategies
- Supported by \$25,000 prototyping grants

Scaling Innovation grants

- Follow-up to participation in *Incubating Innovation*
- Competitive grants of up to \$75,000 a year for 2 years
- To expand promising tested innovations while developing sustainable mix of revenues and contributions
- To help reinforce adaptive cultures



Staging Change: Dates of initial activities

June 11th (2pm)

Deadline for application

June 27th

Confirmation of participation

September 6th

Workshop #1

September 27th

Workshop #2

October 25th

Workshop #3

November 8th

Workshop #4

November 29th

Workshop #5

December 11th

Workshop #6

Staging Change: Application criteria

1. Ability to identify complex challenges and possible adaptive responses
2. Institutional capacity for innovation and adaptive change
3. Ability to learn from previous attempts at innovation
4. Fit to the *Staging Change* program
5. The likelihood of benefits accruing to the organization from participation

*The Staging Change
Associate Facilitator
Training Initiative*

METCALF
FOUNDATION



Staging Change Associate Facilitator Initiative

Presenter

Melissa Dibble

Managing Director, EmcArts

Associate Facilitator work: Who is it for?

1. Established consultants and organizational leaders (EDs, senior staff, artists)
2. No prior experience in guiding adaptive work
3. Openness to learn EmcArts' approaches across multiple disciplines relating to complex change
4. Preparedness to share your knowledge and support others
5. Commitment to action learning
6. ***Don't have to be from, or working with, a Staging Change organization***

Associate Facilitator Training Initiative

GROUP LEARNING AND SHARING

Workshops

8 Associate Facilitators attend 6 workshops and 3 Training Sessions

\$3,600 per Associate for 9 days of engagement

BUILDING ADAPTIVE CAPACITY

On-site organizational coaching

8 Associate Facilitators observe EmcArts Facilitators and take part in 3 Coaching sessions

INCUBATING AN INNOVATIVE APPROACH

Deep dive into adaptive work

5 Associate Facilitators selected to facilitate Stage 3 - Associates will participate in a 2-day orientation and periodic mentorship calls

Up to \$10,800 for up to 12 days of facilitation and engagement

SCALING NEW STRATEGIES

Embedding adaptive work in the culture

5 Associate Facilitators continue to facilitate adaptive work and project scaling

Up to \$3,600 for up to 4 days of facilitation

2018

2019

2020 - 2022

Associate Facilitator curriculum examples

1. Principles of process facilitation

- *Content neutrality/process commitment*
- *3 levels of intervention*
- *Managing group dynamics*

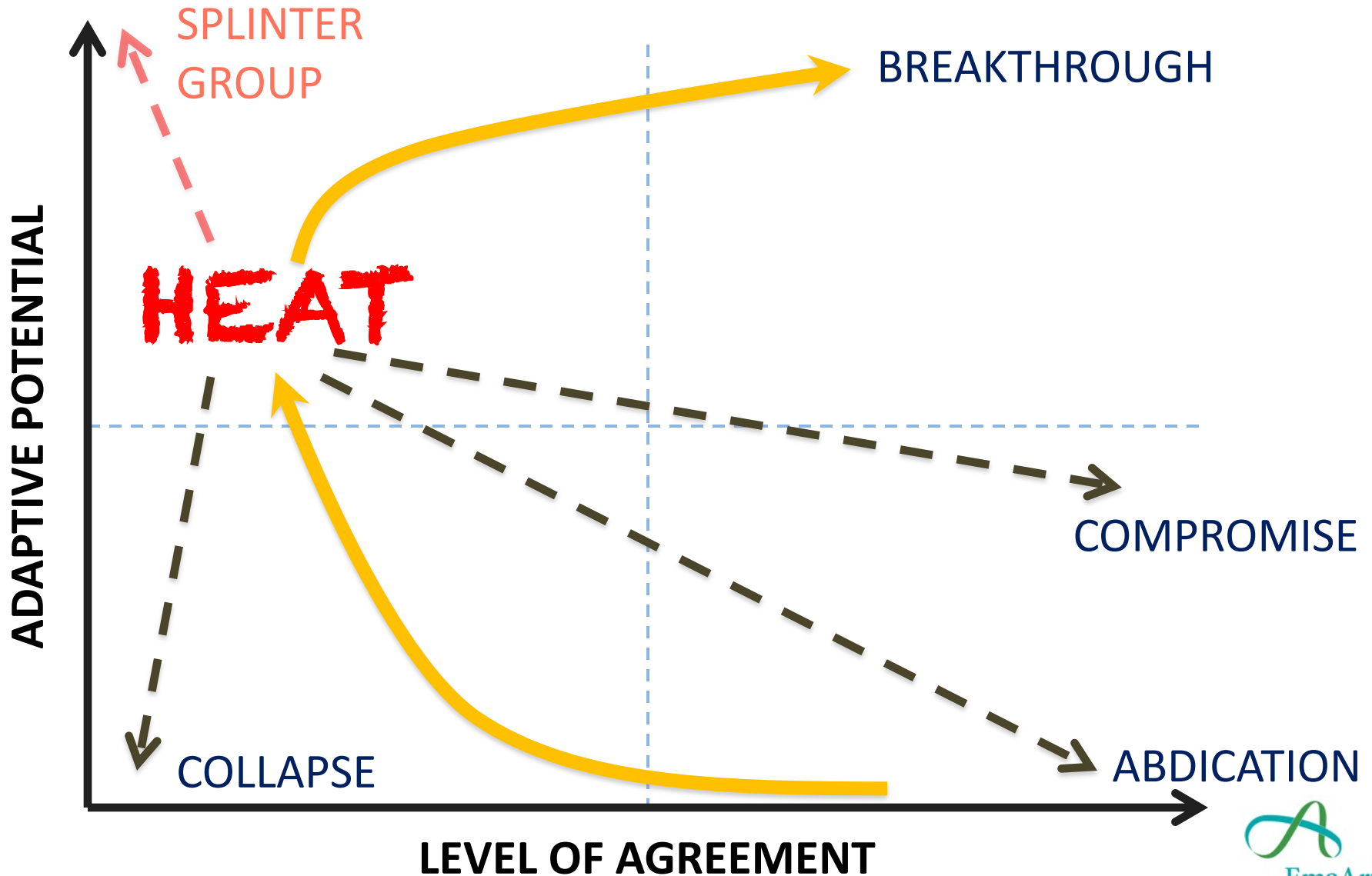
2. Contextual learning on adaptive change

- *Dave Snowden – problem definition and how to respond*
- *Meredith Belbin – team-role preferences*
- *Edgar Schein – the power of assumptions*
- *Ron Heifetz – applying tenets of adaptive leadership*

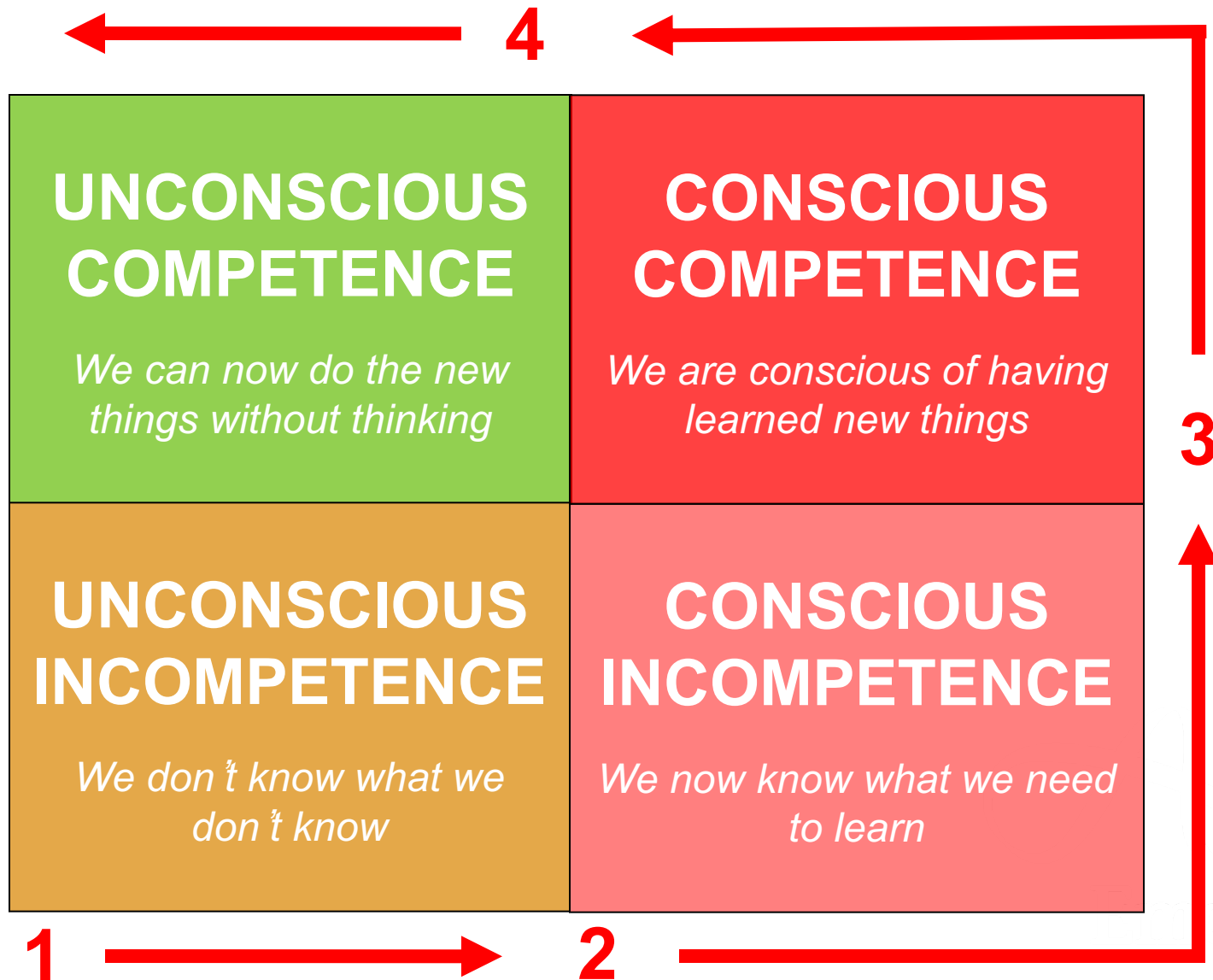
3. Specific moves at different process stages

- *Embodied learning*
- *Managing Heat*
- *Designing experiments and prototypes*

Trajectory of adaptive team dynamics



A competence-based learning model



Selection criteria

1. Ability to communicate with clarity and confidence
2. Experience in managing room dynamics
3. Interest in active listening: synthesizing and reframing contributions
4. Fostering supportive environments that encourage inquiry and open exploration
5. Capacity to provoke questioning of assumptions and development of new insights

Staging Change

**Thank you for joining us today.
Please be in touch if you have any
questions!**