

PERFORMING ARTS PROGRAM

Strategic Experimentation Fund

2024 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:

- advancing strategies that enable economic dignity and prosperity for low-income people and communities in Toronto;
- building transformative solutions that benefit people, climate, and biodiversity; and
- supporting individuals, organizations, and field building 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 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 recent times, the impact of the COVID-19 pandemic has highlighted old — and revealed new — fault lines in the way the sector understands its impact and contribution to society.

Metcalf supports the performing arts sector through the following initiatives:

For Individuals

- Internships
- Johanna Metcalf Performing Arts Prizes/Les Prix Johanna-Metcalf des Arts de la scène

For Organizations

- Booster Fund
- **Strategic Experimentation Fund (information and application follow)**

Field Building

- New Pathways

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.

For nearly a quarter century, Metcalf has provided the performing arts sector with several 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 and compelling, embrace intentional change, are early adopters, 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 — including the ravages of the pandemic, deepened calls for social justice, and shifting audience behaviours in response to the digital transformation of our lives — have placed radical new demands on arts organizations. Additional factors, such as changes in 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 reconsider their value proposition, follow their hunches, and learn about promising directions before committing core operational resources.

Program Structure

The Strategic Experimentation Fund provides an opportunity for organizations to grapple with the status quo — by encouraging strategic approaches to organizational development, capacity building, and problem solving — in all aspects of their operations including artistic, administrative, and audience-building functions, among others. While efforts focusing on the broader sector are eligible for this initiative, we expect that the majority of applicants will focus on their specific organizational needs.

In past iterations of our multi-year support, we have noticed common traits among many organizations that have contributed to their successful implementation of new strategies. While this is by no means a checklist that applicants must address, it is offered as a framing tool to support your preparation of an application:

1. **Unique problem statement:** each organization is best served when they determine and articulate the challenge they are facing on their own terms.
2. **Identify self-directed responses:** acknowledging that, while useful in some circumstances, best practices or external expertise rarely solve the most intractable challenges.
3. **Iterative experimentation:** cycling between testing, learning, and testing again contributes to the stickiness of a new response.
4. **Distributed leadership:** articulation of the challenge, and the design of the responses and experiments, may benefit from the use of cross-functional, multi-constituent teams that are internal and external to the organization.
5. **Grantee cohort support:** peer-to-peer learning and exchange, designed by the cohort, may provide opportunities to deepen the experience.

Phase 1 Experimentation (this application): Grantees will determine their unique challenge, propose some initial responses, and then design and execute iterative experiments, research, and data gathering activities that will speak to the potency and promise of their initial responses. The first phase of activity can begin once successful grantees are notified in early October 2024 and will likely take 6–10 months to execute.

For phase 1, a pool of funds has been set aside to enable peer-to-peer exchange between organizations should they wish. Metcalf will facilitate the development and delivery of the exchange, but its form and content will be determined by the cohort once the approved activities are underway.

Phase 2 Amplification (future applications): SEF's second phase offers increasing amounts of capital to amplify the promising lines of activity that emerged at the end of phase 1. This work may take an additional one or more years and will be iterative in its approach. Grantees will make the case after each successful round of funding regarding the impact of these new strategies and how they plan to bring the most successful ones into their core operations.

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 20% of the total budget request toward late stage, phase 1 activities that are unknowable at the time of the original application. Successful grantees will not be required to provide evidence to 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 evaluation 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: \$8,000.
- Experimentation/research/data gathering: \$28,000.

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.

Important Dates & Deadlines

Information session	April 23, 2024, 2:00-3:30pm ET
Application deadline	June 25, 2024 by 2:00pm ET
Grant notification	October 3, 2024

Metcalf is unable to consider late or incomplete applications for funding. Electronic copies **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 three 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/>

Funding Decision

Applications will be reviewed by Metcalf's board and staff, assisted by an advisory panel from the performing arts community. Funding decisions will be made by the Metcalf board of directors and 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 strength of their responses;
- provide appropriate data and learning strategies to support the evaluation and sense-making of the outcomes of the experiments; and
- indicate the applicant's preparedness for cohort learning and exchange.

Strategic Experimentation Fund 2024 – Application Requirements

Please contact Performing Arts Program Director Michael Trent, at mtrent@metcalffoundation.com, if you have any questions.

Note: The following section is available in a Word version at 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 Duration:

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. 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. Please describe the challenge your organization is currently facing. What makes it the most important thing you need to address at this time? What ways have you tried to address it in the past and what did you learn from your efforts? **1 page**
5. Outline your proposed response(s) to your challenge. **Up to 1/2 page**
6. Provide details of the experiments you would like to undertake to test the potency of your proposed responses. **Up to 1 ½ pages**
7. Who has/will participated/participate in the design, implementation, and analysis of your experiments? **1/2 page**
8. What 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**
10. What learning exchanges with peers have you participated in and what was that experience like for you and your organization? **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 hdunford@metcalffoundation.com by **June 25, 2024, 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 hdunford@metcalffoundation.com.