



CREATIVE
TRUST

EXPANDING THE MANDATE

Creative Trust

Open Source Tool Kit

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Creative Trust Open Source Tool Kit

Expanding the Mandate

Introduction

The Creative Trust was formed in 1998 as a collaborative endowment fundraising initiative, and in late 2002 launched Working Capital for the Arts, a program to help Toronto's mid-size performing arts companies achieve financial health and balance. Working Capital for the Arts - which combined matching deficit elimination grants and working capital awards with an intensive program of work including one-on-one consultations and assistance, workshops, seminars and community roundtables - was the most in-depth, multifaceted and successful arts sustainability initiative in Canada. It grew between 2003 and 2012 to include the Outreach Program, Audiences Project and Facilities Initiative. Creative Trust raised almost \$7 million from private and public donors for this work, and distributed almost \$4 million directly to 21 mid-size performing arts companies. An additional 40+ companies also participated in the Trust's many workshops and professional development activities.

It was Creative Trust's intention from the beginning to sunset after its work was completed and its goals achieved. In October 2012, having helped Toronto's performing arts companies improve their governance, planning and management skills, eliminate deficits, and acquire and maintain working capital reserves, we announced our closing. The Creative Trust legacy includes a measurable and sustained positive impact on the health and stability of many of Toronto's most important mid-size and small music, theatre and dance companies. The work has also had an impact on the arts community beyond. Participants were involved in learning activities which helped them rethink assumptions and change the ways they work; they gained new skills and insights and put them successfully into practice – raising the bar for everyone. Through Creative Trust, Toronto's performing arts community embraced the value of open sharing and collaboration.

These Open Source Took Kits grew out of Creative Trust’s desire to ensure that our results would be understood and sustained, and to share our approach and learning – providing ideas and examples for other arts and non-profit leaders to explore and borrow from. Our deeply rewarding relationship with the Toronto Arts Foundation, through the Creative Trust Research Fellowship, has allowed us to develop these Open Source tool kits - a compendium of processes, policies and program materials. These documents reflect the most important thinking and activities in the success of Working Capital for the Arts. We hope they may offer inspiration and valuable ideas to others as they work to improve the strength and sustainability of their memberships and communities.

Expanding the Mandate

In 2008, after a major course of formal consultation and discussion, Creative Trust began two new initiatives deemed essential if we were to achieve our long-term objective of building a sustainable community: helping companies undertake capital projects to upgrade and repair their aging facilities; and engaging companies in a comprehensive audience development program. Their goal, like that of the Working Capital program, was to ensure a thriving performing arts community whose work would continue to inspire audiences for years to come. Other elements of our legacy, that we were just beginning to recognize, included the creation of a network of organizations committed to collaboration and shared learning; and a group of cultural leaders empowered to continue strengthening the city’s creative music, theatre and dance community. This Tool Kit details the process we undertook to reach these conclusions regarding our work, and the goals and objectives of new initiatives.

Expanding the Borders

This introductory analysis of the possibilities of expanding Creative Trust's mandate and program activity was presented to the Board of Directors for consideration, and was endorsed for follow up and continuing exploration.

Sharing was an original objective of Creative Trust, and since the beginning we have responded to requests from funders, arts service organizations, and peers in the arts and other capacity building sectors across the country to share our learning and outcomes.

More and more frequently we are being invited to talk about the structure and content of our program with arts groups and funders from other municipalities, interested in using Working Capital for the Arts as a model when undertaking their own sustainability programs.

We are now interested in exploring the possibilities of Expanding the Borders of our work, extending the reach of Creative Trust's innovative approach to capacity building beyond Toronto's performing arts community. We are faced with a range of choices to analyze and consider, including but not limited to:

Program considerations (with examples of related inquiries and requests):

- Continuing our activities, with an expanded participant group and program length
 - * Creative Trust has been asked to establish an ongoing professional development series for performing arts professionals; to continue providing skills development opportunities to small organizations; and to assist artist-run galleries and museums to build management skills
- Facilitating special projects, focusing on specific community needs, which involve networking and shared learning
 - * Creative Trust has been approached about coordinating a collaborative audience development initiative; partnering in a project to finance and develop cultural facilities for small and mid-size arts groups; and developing and coordinating a "greening theatres" initiative to help facility-based companies become more environmentally aware and sustainable; the Toronto Arts Council Foundation has expressed interest in "housing" and supporting such projects
- Expanding our geographic reach

*The Trillium Foundation has expressed interest in an initiative in which Creative Trust would advise on the establishment of arts sustainability programs province-wide; the Ottawa Arts Council and Ottawa Culture Office have asked Creative Trust to assist with a sustainability program feasibility study; we have been approached by an artists' collective in Hamilton to offer advice and support on sustainability efforts by artist-run galleries; other regions and municipalities including Haldimand/Norfolk and Kingston have expressed interest in working with Creative Trust to strengthen their local arts communities; and The Canada Council has talked to us about working with communities across Canada on organizational health and sustainability issues

- Expanding our discipline reach

*Creative Trust has met with The Literary Press Group (a national body) to discuss assisting to develop a small publishers' sustainability program; we have been asked to help museums organizations expand their capacity building activities; have done initial work with the Artists' Health Centre, The Actors' Fund and the Dancer Transition Centre, which are seeking to improve their sustainability through a Creative Trust-like initiative; and have had a number of discussions with artists' organizations and artist-run centres on their sustainability needs

- Expanding our sectoral reach

*Funders including The Metcalf Foundation have expressed interest in working with Creative Trust to apply what we have learned to environmental, poverty, youth and social service groups; the Centre for Social Innovation has spoken to us about the need by small social change organizations for a Creative Trust-like initiative

- Consulting, advising

*An alternative to active involvement in initiatives like the above would be to work one-on-one with cultural clusters or arts service and membership organizations on sustainability issues including financial balance, vision, values and mission, and governance

- Ancillary activities to the above would include further developing our

- Publications
- Website learning pages and
- Web-based learning activities

- Facilitating an ongoing network, with new or revolving leadership, to continue to respond to community needs

*The arts community has recently shown evidence of a reawakened activism around advocacy for the arts in a community and societal context – these activities would benefit from an organization mandated to facilitate such collaborations

Organizational and structural considerations:

- Readiness
- Financing
- Delivery
- Evaluation
- Communicating our new direction to ensure support of participants and stakeholders

Communications considerations:

- Communicating our new direction to ensure support of participants and stakeholders

Strategic Options Interim Report to Board

Following numerous meetings and discussions about the possibility of expanding our mandate, this Interim Report was approved by the Board of Directors on April 8, 2008.

I have had numerous meetings and discussions since the fall regarding our investigation of new directions and activities for Creative Trust in the years between now and our sunset at the end of 2010. In looking at opportunities and suggestions for program development and requests for assistance, I have been trying to identify, first and foremost, whether there are important needs within the community that Creative Trust – with the experience and expertise we’ve developed in our work – is uniquely qualified to meet.

At the board, we have agreed that we wish to ensure that our results are understood and sustained, and to share our approach and learnings beyond our own community – providing ideas and guidance to other arts and non-profit leaders on how to improve the strength and sustainability of their memberships and communities.

The Taking the Pulse sessions in June 2007 (roundtable meetings with all Working Capital for the Arts participating companies, over two days) affirmed that our members are equally committed to the above. They also helped us understand the current “state of the arts” (what environmental/community factors are influencing our work and the work of our members); allowed the companies to share what they’ve experienced and where they’ve moved to since the beginning of the program; and provided a sense of what they need from Creative Trust (or perhaps outside of Creative Trust)

Direction

Discussions so far have highlighted three new directions that the program might take, as well as two areas in which we might continue our current work:

- continuing to provide learning activities to both mid-size and outreach companies
- continuing to assist as needed to ensure that the successes achieved by Creative Trust companies are sustained
- developing special focus areas arising from the work of Creative Trust – specifically in capital projects and audience development
- developing leadership and networks to enable the continuation of important shared initiatives within the community
- bringing the lessons of Creative Trust to other sectors

- helping to move the Creative Trust experience to other geographical areas

Continuing to provide learning activities to mid-size and outreach companies, and continuing to ensure that the successes achieved by Creative Trust companies are sustained

- There is a strong need and desire within the community to continue learning together; no other organization in Toronto is providing consistent, varied skills development opportunities.
- Maintaining the ability to intervene or assist in times of leadership change, financial set back, or artistic reevaluation, helps ensure that Creative Trust companies sustain the gains they've made.
- Requires additional administrative funding to maintain core staff and office at current level.

Development of special focus areas arising from the work of Creative Trust

Facilities

- Twelve Creative Trust companies are currently planning or in the midst of repairs, renovations or expansion of their facilities. These are not optional projects; Toronto's mid-size and small performing arts spaces are in urgent need of attention.
- At a Capital Projects Roundtable in January 2008, companies identified five ways in which Creative Trust's assistance would help make these projects a success:
 - Changing the environment, creating the conditions for success: communicating the need, creating financing opportunities, advocating for public funding and assistance at all three levels of government, identifying new sources and opportunities especially in the areas of accessibility and "greening theatres."
- Learning from others: creating opportunities for conversations with the large institutions whose capital projects are completed or in process.
 - Providing and researching project management, planning and organizational strength.
 - Identifying and cultivating private funding sources.
 - Board and capital committee training.

Audience Development

- Another theme at the Roundtable was Audience Development: ensuring that audiences maintain their interest in the companies we have been working to sustain.
 - Creative Trust's focus would be on changing internal behaviors and ways of working, encouraging and assisting companies to strengthen their connections to their audiences.

Leadership and network development

- Developing leadership within the community and facilitating an ongoing network that will continue to respond to community needs

- Requires additional administrative funding to maintain staff and office; requires project funding to research issues; develop resource materials; and work with specialist consultants.

Bringing the lessons of Creative Trust to other sectors

- The Literary Press Group, following many meetings and discussions with Creative Trust, is seeking funding for a feasibility study of a capacity building and sustainability initiative such as Creative Trust for small publishers.
- The Ontario Association of Art Galleries has initiated discussions on a project to help their members eliminate deficits and become stronger and more sustainable.
- Other possibilities include: board workshops for young professionals with Business for the Arts; community arts capacity building with the Toronto Arts Council; a sustainability program for small social change organizations with the Centre for Social Innovation.
- Requires initially assisting these organizations to acquire project funding, including funding for Creative Trust's time and assistance; Creative Trust would serve as the "change consultant" to these initiatives.

Helping to move the Creative Trust experience to other geographical areas

- The Ottawa Arts Council and the Ottawa Culture Office have asked Creative Trust to assist with a sustainability program feasibility study.
- We have been approached by an artist's collective in Hamilton to offer advice and support on sustainability efforts by artist-run galleries.
- The Grey Bruce Cultural Network has expressed interest in learning from Creative Trust.
- The Trillium Foundation has expressed interest in an initiative in which Creative Trust would advise on the establishment of arts sustainability programs province-wide.
- There will be other opportunities to work one-on-one with cultural clusters or arts service and membership organizations on sustainability issues including financial balance, vision, values and mission, and governance.
- Requires additional administrative funding to maintain staff and office; requires project funding to develop resource materials, and contract Creative Trust and other consultants.

Readiness activities

- Networks for Impact, Harvard Business School, May 2007
- Social Entrepreneurship Summit December 4, 2007 at the MARS Centre - The TCSCA, in partnership with The Boston Consulting Group, MaRS and the Centre for Social Innovation
- Speaking to Inspire at the Gibraltar Point Centre for the Arts, January 25, 2008

- ONN Steering Committee membership

Funding prospects

- Department of Canadian Heritage
- Ministry of Culture, Province of Ontario
- The Ontario Trillium Foundation
- BMO (Outreach Initiative)
- Great West Life (Outreach Initiative)
- TD Bank (Audience Development)
- PQR (Audience Seminar)
- The Metcalf Foundation (to apply what we have learned to environmental, poverty, youth and social service groups).

Strategic Consultation Process

Consultations continued in June 2008, when we presented initial conclusions about expanding our mandate to Creative Trust's participating companies. This summary of the Strategic Consultation Process was presented to the Board of Directors, and approved.

During the months of June 2007 and June 2008, Creative Trust held consultation sessions and conversations with approximately 100 people including artists, arts managers, arts organization representatives and community stakeholders. Creative Trust member companies, individuals from the arts community, the grant community and the arts service organization community were invited to take part through individual email invitations and personal telephone calls by Shana Hillman, Program Manager and Jini Stolk, Executive Director. A total of 2 group sessions were held in addition to numerous individual meetings and telephone conversations with Jini Stolk and Creative Trust's Director of Technical Assistance, Jane Marsland and Director of Program Evaluation, Peter Brown. Please see the attached list of those consulted.

We had been trying to identify, first and foremost, whether there are important needs within the community that Creative Trust – with the experience and expertise we've developed in our work – was uniquely qualified to meet.

At the board, we had agreed that we wished to ensure that our results are understood and sustained, and to share our approach and learnings beyond our own community – providing ideas and guidance to other arts and non-profit leaders on how to improve the strength and sustainability of their memberships and communities.

Group sessions were oriented to the professional leadership of our member companies (Artistic Directors and General Managers/Managing Directors). The Taking the Pulse sessions affirmed that our members are equally committed to the above. They also helped us understand the current “state of the arts” (what environmental/community factors are influencing our work and the work of our members); allowed the companies to share what they've experienced and where they've moved to since the beginning of the program; and provided a sense of what they need from Creative Trust (or perhaps outside of Creative Trust.)

Sessions were not divided based on arts disciplines or the stage where companies are at in our program. Jini Stolk led the introductions and provided a background presentation on Creative Trust, Jane Marsland facilitated all sessions and Shana Hillman, Program Manager, took notes.

In general the sessions were both exciting and illuminating. It was gratifying that so many people were enthusiastic about providing their thoughts and suggestions for how the Creative Trust could evolve in the future and what assistance we could be to the mid sized performing arts sector.

Artists, arts workers and stakeholders expressed great pleasure at having been invited to sessions. Artists and arts workers represented every arts discipline, a broad cross-section of organizations, and many of Toronto's diverse cultural backgrounds and experiences. Those attending also noted that they were pleased to have had the opportunity to find out more about the potential future directions for Creative Trust and that there was the possibility of an ongoing program past 2009.

Creative Trust Proposal to (a) Foundation

A foundation that been an early and consistent supporter of Creative Trust expressed interest in helping us build our own capacity to develop new activities identified during our consultations. This proposal was successfully submitted in 2008; the resulting financial support was essential to the success of Creative Trust's Audiences Project, Facilities Initiative and expanded communications program.

Introduction

Since 2003 our Working Capital for the Arts program has had significant success at improving the financial health and sustainability of 21 of Toronto's most innovative and creative mid-size music, theatre and dance companies. The Outreach Initiative, begun in 2005, expands the reach of these activities to include 30 small, independent and culturally diverse organizations, providing them with access to the learning and collaborative opportunities at the heart of our program.

All these companies were chosen because of their strong artistic achievement and community support. Creative Trust's objective is to help them develop the administrative and financial skills they need for long-term fiscal health and to successfully support their art.

The program is working. Our participating companies have eliminated accumulated deficits, achieved significant overall increases in private sector fundraising, and made impressive progress in strategic planning, financial balance, and governance practices. Creative Trust is successfully addressing the need to build strong, effective, and sustainable performing arts companies empowered with the skills, tools, information and financial support needed to ensure long term health and well-being. Many of these companies have expressed, in their own words, how important Creative Trust is to them.

Having recently completed the third year of our six-year sustainability program, Creative Trust is now looking ahead to analyze the cultural and nonprofit community's capacity building needs; identify where we can be more effective; and prepare ourselves for a new phase that calls upon the experience and expertise we've developed in our work so far.

Creating a legacy

Creative Trust currently addresses a unique need in Toronto's cultural community. Our success, however, has been catching the attention of a range of arts funders and professionals in other nonprofit fields who are interested in our model for building capacity and sustainability.

The strong interest in our results and findings has led to a discussion about Creative Trust's legacy. We understand that we are creating a legacy of stable performing arts organizations whose work will continue to inspire, challenge and entertain audiences for years to come; and that we are building the sustainability of a sector essential to Toronto's cultural and economic well-being.

Other elements of our legacy, that we are just beginning to recognize, include the creation of a network of organizations committed to collaboration and shared learning; and a group of cultural leaders empowered to continue strengthening the city's creative music, theatre and dance community.

We feel a desire and responsibility to ensure that the above results are understood and sustained, and to share our approach and learning beyond our own community – providing ideas and guidance to other arts and nonprofit leaders on how to improve the strength and sustainability of their memberships and communities.

We also feel that this is the appropriate time to undertake a strategic analysis of possible new directions and activities – capitalizing on our current success, resources and energy.

The Working Capital for the Arts Program: A Model for Others

Creative Trust is filling an important gap in support for Toronto's performing arts community, and is the only organization whose specific purpose is to improve the financial health and sustainability of creative music, theatre and dance organizations. In recent years, private sector funding for the arts has been overwhelmingly focused on the large cultural facilities rising on our city's skyline. Creative Trust's focus is on ensuring that those mid-size, small and culturally diverse companies are not overlooked, but are able to give voice to our community's realities, concerns and dreams for the future, are able to move and inspire audiences for years to come.

The organizations that have been participating in Working Capital for the Arts need assistance in achieving lasting change; none has sufficient internal resources to ensure long-term sustainability. Long-term stability is achieved most effectively by giving companies the capacity to respond and adapt to environmental changes. The Working Capital for the Arts program helps organizations help themselves, and understand and cope with problems and challenges.

Participating companies are provided with intensive one-on-one consultations and coaching in all areas of performing arts management. Skills are also enhanced, and shared through group learning activities such as seminars, workshops, roundtables and a speaker's series, on topics including financial management and reporting, governance, leadership, audience development and elements of fundraising. Companies produce sustainable work plans that focus on deficit elimination and fiscal responsibility.

Our program challenges these companies to achieve fiscal prudence and sound business management. Once they bring their management practices to the highest levels and to a balanced bottom line their achievements are rewarded with working capital grants.

The program's objective is a stronger, more vibrant performing arts community whose music, dance and theatre companies create, produce and present their work in a healthy and sustainable way.

Other indicators of our success include

- Community support of the program and its goals;
- The extent to which we develop a "learning community", i.e. a community that actively shares knowledge and collectively seeks new knowledge;

- The extent to which funders and the public perceive the performing arts sector as being well managed and proactively seeking new and creative management solutions;
- The influence of the lessons of the program on how arts managers and funding providers carry out their work;
- The extent to which the program’s methodology is understood and viewed as a “best practice” within the sector;
- The enhancement of the perceived value of the performing arts.

Evaluating our Results

Creative Trust has a comprehensive evaluative process that monitors quantitative, as well as qualitative achievements in key aspects of organizational health, including deficit reduction, percentage of working capital, audience size, volunteer involvement, management leadership, audience relationship, and commitment to goals.

Creative Trust’s annual Evaluation Reports are based on a comprehensive process with clearly articulated objectives and an assessment of the program’s achievements and failures. They examine, measure and monitor organizational characteristics, internal operating capacities and behaviors that, taken together, provide the healthiest and most balanced framework for an arts organization. The reports include annual quantifiable financial evaluations of each organization, and other non-financial quantifiable evaluation measures such as volunteer involvement, audience sizes, and the evidence of appropriate planning processes in place and working.

Highlights from 2004, our first full year of activity:

- All 11 companies admitted in year one made impressive progress in strategic planning, financial balance and governance practices.
- They increased their private sector support by 14.8%, to \$3.9 million or 24% of combined revenues.
- Their total revenues increased 6.3%, from \$14.9 million to \$15.9 million.
- Of the six companies that entered the program with accumulated deficits, total revenues increased 15%, and combined deficits decreased by 47%. (Two companies’ accumulated deficits were eliminated entirely; the others made significant progress on deficit reduction.)

In 2005, we expanded the program to include 11 additional companies, for a total of 22 participants. Highlights from our second year:

- For the 11 companies admitted in year one, total revenues increased by 6.9% or \$1 million over the first two years.
- Private sector fundraising for these 11 companies rose over the two-year period by an average of 13.6% or \$447,000, to 23.3% of their increased revenues.
- The working capital position of the first 11 companies was negative 1.4% of annual revenues on entry to the program. By the end of the second year their average working capital positions had improved to 1.2% of their increased revenues. (One more of the first 11 companies completely eliminated its accumulated deficit.)
- For the 11 companies entering the program in the second year, the working capital of those with accumulated deficits on entry improved in only one year from minus 6.4% to minus .5% of combined revenues. (Three of these companies' accumulated deficits were eliminated entirely.)

Other highlights:

The Outreach Initiative is being extended and expanded thanks to a grant from the Toronto Community Foundation that allows us to continue for another year with an additional 15 new members.

In total, Creative Trust companies have qualified for \$1,687,363 in grants and awards to date; nine long-term accumulated deficits have been fully retired; and almost every participant has begun building a permanent Working Capital Reserve on its balance sheet.

Fundraising Progress

In order to meet all our expectations and realize the full potential of our program Creative Trust established a goal of raising \$6.1 million. Just halfway through our six-year program we have succeeded in reaching 95% of this target, in an equal partnership between the public and the private sectors. Half of the remainder has been committed by Ontario's Ministry of Culture, leaving less than \$200,000 still to raise from corporations, individuals, and foundations.

Our Request

We are requesting assistance of \$50,000 to undertake a strategic approach to analyzing the options before us; deciding on the best and most effective use of our experience, expertise and resources; and readying our organization for its next phase. We anticipate that this process will take place over eight - ten months.

Project outline

Phase I: (Completed to date)

- A review of current requests for assistance and opportunities for program development
- A decision by the Board to undertake a strategic analysis of the above, under the oversight of the Executive Committee
- Taking the Pulse sessions – roundtable meetings with all Working Capital for the Arts participating companies, over two days, to look at the “state of the arts” (what environmental/community factors are influencing our work); to share what we’ve experienced and where we’ve moved to since the beginning of the program; and to look forward and get a sense of what they need from Creative Trust (or perhaps outside of Creative Trust)

Phase II: Comprehensive consultations, in the form of individual, group and community meetings, including

- Determination of the role of, and choosing and engaging a facilitator
- Consultation sessions with representatives from major funding bodies (including the Ontario Trillium Foundation’s Province-Wide Program, the Ontario Arts Council’s Compass Program, the Canada Council’s discipline and equity offices, and the Toronto Arts Council Foundation);
- Consultation sessions with representatives from arts service, special project and membership organizations (including potential partners such as ArtsBuild, Artscape, Business for the Arts, Toronto Alliance for the Performing Arts, Theatre Ontario, Canadian Artists Representation Ontario; and selected community arts councils across the province);
- Consultation sessions with selected representatives from the arts community (both Creative Trust participants and not, including culturally diverse artists and groups);
- Board updates and consultation at regularly scheduled board meetings throughout

Phase III: Analyzing, recommendations and decision making, including:

- Analysis of community’s expressed needs, in light of Creative Trust’s experience, expertise and capacity
- Recommendation for new direction and activities based on best fit and opportunities

- Detailed report to board; discussion of recommendations and decision making
- If the decision is made to undertake a new direction and activities, we will proceed to the next phase

Phase IV: Readyng the organization for new roles and activities, including:

- Agreement on vision, values, objectives and key activities
- Assessment of new governance needs and solicitation of board members
- Creation of business plan combining earned and contributed income; approval by board
- Creation of strategic communications plan; approval by board
- Development of detailed program; approval by board
- Analysis of funding opportunities for new activities; meetings with prospective funders
- Initial work-for-fee agreements/and funding proposals

Strategic Consultation

During the months of June 2007 and June 2008, Creative Trust held consultation sessions and conversations with approximately 100 people including artists, arts managers, arts organization representatives and community stakeholders. Creative Trust member companies individuals from the arts community, the grant community and the arts service organization community were invited to take part through individual email invitations and personal telephone calls by Shana Hillman, Program Manager and Jini Stolk, Executive Director. A total of 2 group sessions were held in addition to numerous individual meetings and telephone conversations with Jini Stolk and Creative Trust's Director of Technical Assistance, Jane Marsland and Director of Program Evaluation, Peter Brown. Please see the attached list of those consulted.

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equally committed to the above. They also helped us understand the current “state of the arts” (what environmental/community factors are influencing our work and the work of our members); allowed the companies to share what they’ve experienced and where they’ve moved to since the beginning of the program; and provided a sense of what they need from Creative Trust (or perhaps outside of Creative Trust)

Sessions were not divided based on arts disciplines or the stage where companies are at in our program. Jini Stolk led the introductions and provided a background presentation on Creative Trust, Jane Marsland facilitated all sessions and Shana Hillman, Program Manager, took notes.

In general the sessions were both exciting and illuminating. It was gratifying that so many people were enthusiastic about providing their thoughts and suggestions for how the Creative Trust could evolve in the future and what assistance we could be to the mid-sized performing arts sector.

Artists, arts workers and stakeholders expressed great pleasure at having been invited to sessions. Artists and arts workers represented every arts discipline, a broad cross-section of organizations, and many of Toronto’s diverse cultural backgrounds and experiences. Those attending also noted that they were pleased to have had the opportunity to find out more about the potential future directions for Creative Trust and that there was the possibility of an ongoing program past 2009.

Community Consultations, List of those consulted

Participating Companies Round One

Ballet Jörgen Canada

Buddies in Bad Times Theatre

Dancemakers

Elmer Iseler Singers

Kaeja d’Dance

Lorraine Kimsa Theatre for Young People

Opera Atelier

Tafelmusik Baroque Orchestra and Chamber Choir

Tapestry New Opera Works

Théâtre français de Toronto

Toronto Dance Theatre

Participating Companies Round Two

Danny Grossman Dance Company
Esprit Orchestra
Factory Theatre
Necessary Angel
Nightwood Theatre
Soundstreams
Tarragon Theatre
Theatre Direct
Theatre Passe Muraille
Toronto Children's Chorus

Outreach Companies

Cahoots Theatre Projects
Clay and Paper Theatre
The Theatre Centre

Arts Services Organizations/Arts-Funders/Steakholders

Actor's Fund
Artist's Health Centre Foundation
Artsbuild
Artscape
BMO
The Boston Consulting Group
Canada Council for the Arts, Equity Office
Centre for Social Innovation
Dancer Transition Resource Centre (DTRC)
George Cedric Metcalf Foundation
Grey Bruce Cultural Network
Literary Press Group
MaRS
Ministry of Culture
Ontario Association of Art Galleries (OAAG)
Ontario Arts Council
Ontario Museums Association
Ontario Nonprofit Network

Ontario Trillium Foundation

Ottawa Arts Council

Ottawa Culture Office

Professional Association of Canadian Theatres (PACT)

PQR Foundation

Toronto Alliance for the Performing Arts (TAPA)

Toronto Arts Council

Toronto Arts Council Foundation

Strategic Plan, Creative Trust's Next Phase

2008 to 2010

This Strategic Plan for initiating Creative Trust's expanded mandate and next phase of activities was approved by the Board of Directors, June 3, 2008.

Overview

This proposal evolved from numerous meetings and discussions – with members, funders, colleagues, prospective partners and more – regarding Creative Trust's possible direction and activities between now and our sunset at the end of 2010.

In looking at the many possibilities and suggestions that came forward, I have tried to identify, first and foremost, the most important needs within the community that Creative Trust, with the experience and expertise we've developed in our work so far, is uniquely qualified to meet.

I have also taken into account our desire to ensure that our results are sustained and understood, and to share our approach and learnings beyond our own community – providing ideas and guidance to other arts and non-profit leaders on how to improve the strength and sustainability of their memberships and communities.

The recommendations below reflect those priorities.

Recommended Focus and Programs

I recommend that our first focus be on deepening our mission through two **keystone initiatives** with Creative Trust companies, arising from our work to date. The first is to assist with the many capital projects being planned by Working Capital and Outreach companies – helping them plan and execute these projects successfully, and thereby contributing to Toronto's range of appealing and accessible small and mid-size performing venues. The second is to engage all Creative Trust members in a deeper initiative around audience development – helping Toronto's creative theatre, music and dance companies build strong and committed audiences now and in the future.

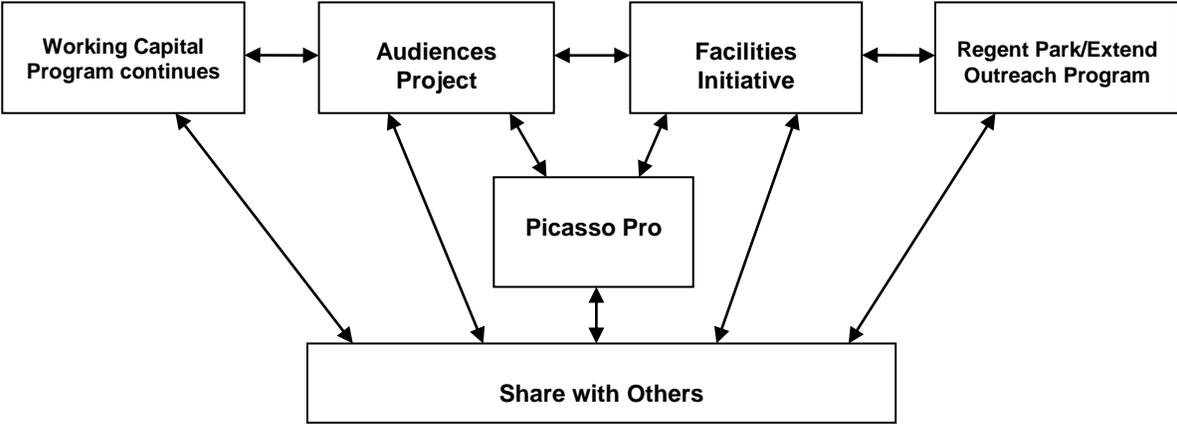
In response to urgently stated community need, I recommend that we continue our professional development activities and broaden them into a learning, leadership development and networking initiative. This will

include continuing to provide opportunities for the community to learn management skills from leading experts, and learn from each other by sharing what works. We will also identify and encourage individuals to take on future leadership roles, and facilitate an ongoing network of communication and collaborative action that will allow the community to continue to act on its own behalf after Creative Trust.

Finally, I recommend a sharing and mentoring initiative, through which Creative Trust shares what we have learned with other disciplines and communities, helping them to develop their own capacity building and sustainability programs.

Next Phase Organizational Chart

Creative Trust: Building a Sustainable Community



Keystone Initiatives Detailed Plans

Detailed strategies, objectives and action plans were developed for each of Creative Trust's new areas of work, which were implemented between September 2008 and our closing in October 2012.

New Strategic Initiative: Audiences Project

We believe that the arts should be a part of everyone's life; that the arts can provide unique opportunities for learning, growing, understanding, connecting culture, peacefully co-existing and exchanging ideas; that the arts can play a positive, transformational role in people's lives; and that art can provide opportunities for healing and problem solving even as it provides beauty, joy and challenging ideas. Moreover, without strong, committed and growing audiences for live performing arts in Toronto, Creative Trust's efforts to build stable and sustainable arts companies will eventually founder.

The purpose of the Audiences Project is to engage Creative Trust members in an in-depth approach to community engagement and audience development, drawing on the most successful and best informed practices from our own city and around the world – in order to help Toronto companies build strong and committed audiences, and ensure that the people of Toronto receive the joys and benefits of participating in the arts.

Creative Trust is committed to delivering a program of measurable and broad impact by monitoring the results and tracking the effectiveness of our efforts; documenting and disseminating the program's findings and results; and sharing them widely across the arts community in Toronto and Ontario.

Objectives

- Help Creative Trust companies understand and embrace the best practices in audience outreach, development and retention
- Focus on changing internal behaviors and ways of working, encouraging and assisting companies to strengthen connections to their communities and audiences
- Assist companies to develop the best and most appropriate systems, including data management and online resources, to maintain these connections and communicate effectively
- Explore the role and impact of arts education activities on current and future audiences, and on contributing to the development of youth and society

- Help build audiences and communities that are committed to Toronto’s creative performing arts and the companies we have been working to sustain

Partners

- We have already committed to working with government partners on program development and dissemination including the Ontario Arts Council “Build Connections” initiative and The Canada Council’s Equity Office
- Confirmed community partners include the Toronto Alliance for the Performing Arts (TAPA), Harbourfront Centre, Performing Arts Organizations Network for Education (PAONE), and Cultural Careers Council of Ontario’s (CCCO) Summer Institute. Other arts service organizations such as PACT, Theatre Ontario, Dance Umbrella of Ontario, Dance Ontario and CCI - Ontario's Presenting Network will be invited to attend or co-host sessions
- We will be working closely with key arts education institutions including Tafelmusik, Lorraine Kimsa Theatre for Young People, Kaeja d’Dance, Theatre Direct, and others
- Potential partners include the Canada Council Audience and Market Development Outreach Office; the Ontario Arts Council Arts Education Office; the Canada Council for the Arts Dance, Theatre and Music Offices; The Ontario Trillium Foundation; Prologue for the Performing Arts; eyeGO to the Arts; and large performing arts companies including the National Ballet of Canada.

Plan of Action

Objective: Help Creative Trust companies understand and embrace the best practices in audience engagement, development and retention; focus on changing internal behaviors and ways of working, encouraging and assisting companies to strengthen their connections to their communities and audiences

- Form an Advisory Committee to develop an in-depth audience development and arts education professional development curriculum
- Explore and secure learning activity and project partners who share Creative Trust’s vision and commitment to audience development in our community
- Announce the program to our members as a progressive, integrated learning experience; be clear about purpose, context, objectives; ask each company to commit to participate
- Assist companies to develop an organization-wide commitment to audience development, and to the development of effective internal and external lenses, tools, forms of analyses, processes and actions for increasing the energy, commitment and continuing involvement of existing and potential audiences

- Bring the community together in regular roundtables to discuss learnings, issues and long-term approaches
- WITH PARTNERS, offer workshops in Audience Trends (Kelly Hill, November), Communicating and Building Bridges to Diverse Audiences (Donna Walker Kuhne, November), Communicating Value of Arts Participation AND Peer to Peer Marketing (Alan Brown, February), marketing and communications, and social networking and other web-based approaches
- WITH PARTNERS, offer networking-based “case camps” highlighting the best practices of our peers in the arts and nonprofit sectors in regards to audience development
- WITH PARTNERS, host a two-day audiences conference bringing together leading international thinkers and practitioners in the areas of audience development and arts education

Objective: Assist companies to develop the best and most appropriate systems, including data management and online resources, to maintain these connections and communicate effectively

- Offer a “data systems and management” workshop, including discussion of what data to collect, how to manage data and how to best sustain data management structures
- Host small group demonstrations, as appropriate and needed, on database options
- Offer the services of a data base/Customer Relationship Management (CRM) systems expert in small group sessions and/or one-on-one consultations in order to help companies develop their systems or move to new systems

Objective: Explore the role and impact of arts education activities on current and future audiences, and on contributing to the development of youth and society

- Build skills and provide opportunities for member companies to explore new technological tools which reach and involve youth
- Facilitate the sharing of best practices in arts learning programs
- Develop case studies and share best practices more widely within the Toronto community and with companies outside the Greater Toronto Area
- Devote a roundtable to beginning a discussion and exploration of our community’s role and long-term objectives in the area of arts learning and education
- Invite funders of arts education and youth initiatives to a second roundtable for an open discussion with Creative Trust companies on support for the development of arts education programs and the expected outcomes of these initiatives

Objective: Help build audiences that are interested in and committed to Toronto’s creative performing arts and the companies we have been working to sustain

- Organize a major audience development seminar, bringing together leading thinkers and practitioners in this area
- WITH PARTNERS, work to increase overall audience participation in Toronto’s performing arts community, in both numbers and repetition
- WITH PARTNERS, work to increase the City of Toronto’s understanding of the essential role of the arts in its future, and the value and impact of its policies and programs to advance and support the arts
- WITH PARTNERS, work to increase the perceived meaning and value of participation in the creative performing arts
- Objective: Contribute to successful fundraising by advising funders of the specific needs and challenges of small and mid-size Toronto companies undertaking capital projects, and by researching and cultivating prospective new donors

New Strategic Initiative: Toronto Facilities Initiative

Creative Trust has always understood that working capital is only one of the capital needs of performing arts organizations, and affordable, accessible, appealing and safe facilities and performing venues are essential for the community to thrive. Many Creative Trust companies, enjoying a new level of financial health and organizational capacity, are now poised to tackle the space issue: 13 are currently planning or in the midst of repairs, renovations or expansion of their facilities. These are not optional projects; Toronto's mid-size and small performing arts spaces are in urgent need of attention.

Creative Trust, with the experience and expertise we've developed in our work so far, is ideally positioned to help these companies plan and execute their projects successfully. We will also work together with key community, government and resource partners, facilitating the commitment and cooperative energies required to achieve our overall goal – of ensuring that Toronto has a range of appealing and accessible small and mid-size performing venues suitable to the needs of its creative artists, performing arts companies and audiences.

Objectives

- Help change the environment and create the conditions for success by communicating the need and acting as advocate for the rehabilitation of Toronto's small and mid size performing arts venues
- Create a network for companies to share information and learn from each other, and facilitate group learning on capital project planning, fundraising and implementation
- Assist companies to prepare to undertake a capital project; provide assistance and coaching on maintaining artistic focus and organizational strength throughout; assist as appropriate with project planning, budgeting, fundraising and project management
- Contribute to successful fundraising by advising funders of the specific needs and challenges of small and mid size Toronto companies undertaking capital projects, and by researching and cultivating prospective new donors
- Help these projects meet the highest possible standards of energy efficiency, environmental sustainability and accessibility

Partners

- Community: The Culture Group (ArtsBuild, Artscape, Business for the Arts, the Municipal Cultural Planning Partnership), Creative Space Enablers Network, TAC, TACF, Ontario Trillium Foundation, Toronto Community Foundation, environmental and accessibility programs and funders
- Government: City of Toronto, Ontario Ministry of Culture, Department of Canadian Heritage
- Resource Partners: Janis Barlow & Associates, Picasso Pro, Arts for Social Change Funding Circle, environmental, accessibility and other non-governmental organizations, and architectural, environmental, accessibility, fundraising and other business experts

Plan of Action

Objective: Help change the environment and create the conditions for success by communicating the need and acting as advocate for the rehabilitation of Toronto's small and mid-size performing arts venues

Activities

- Develop and maintain an up to date summary of projects, their progress and funding needs; create an attractive portfolio for use in advocacy and donor cultivation
- Participate in the Cultural Space in Toronto Enablers' Network
- WITH PARTNERS, advocate at the municipal level for policy and programmatic support of Toronto's performing arts venues, and for increased funding for capital projects by small and mid-size performing arts companies
- WITH PARTNERS, explore alternative municipal support through sources such as the Toronto Atmospheric Fund; the Better Buildings Program; the Green Municipal Fund; Heritage Toronto, etc.
- WITH PARTNERS, advocate at the provincial and federal levels of government for responsive, accessible and appropriate public funding for capital projects by small and mid size performing arts companies; represent Toronto's needs

Objective: Create a network for companies to share information and learn from each other, and facilitate group learning on capital project planning, fundraising and implementation

Activities

- Convene regular meetings of Creative Trust's Capital Projects Roundtable; facilitate the sharing of information through the Roundtable and between meetings, via the internet; invite expert guests as appropriate; and create opportunities for conversations with arts organizations whose capital projects are recently completed or underway

- WITH PARTNERS, provide group learning sessions led by experts in the field of capital planning, fundraising and implementation from Toronto, Canada, and other countries
- WITH PARTNERS, share Creative Trust companies' experiences and practices with arts and other non profit organizations outside Toronto

Objective: Assist companies to prepare to undertake a capital project; provide assistance and coaching on maintaining artistic focus and organizational strength throughout; assist as appropriate with project planning, budgeting, fundraising and project management

Activities

- Provide one-on-one coaching to monitor and assist with organizational and financial stability throughout members' capital projects; provide one-on-one assistance in the areas of readiness, planning, budgeting, fundraising and project management
- Assist with project fundraising by providing board and capital campaign committee coaching as appropriate Activities
- Research and identify alternative public and n.g.o. funding sources and opportunities; inform, cultivate and facilitate prospective new funders where possible and appropriate
- Identify new private sector donors for members' projects, working with CT board, advisory committee, and donors; cultivate and encourage prospective new donors where possible and appropriate
- WITH PARTNERS, work to encourage and develop financing opportunities for these projects

Objective: Help these projects meet the highest possible standards of energy efficiency, environmental sustainability and accessibility

Activities

- Research and identify targeted funding, incentives and information on how to make these projects "green" and accessible; explore opportunities for partnerships with environmental, energy and disability organizations
- WITH PARTNERS, identify affordable energy efficient and environmentally sound building methods, materials, and suppliers, working with architectural and other experts in the field

New Strategic Initiative: Learning, Leadership and Networking

There is a strong need and desire within the community to continue learning together, and no other organization in Toronto is providing consistent, varied skills development to performing arts professionals. Creative Trust will continue to provide learning and organizational development opportunities to mid size and outreach companies, including opportunities for the community to learn management skills from leading experts, and learn from each other by sharing what works.

In order to ensure that the gains made through Creative Trust are maintained and that our legacy is a permanently stronger performing arts community, Creative Trust will work to develop leaders within the community, identifying, encouraging and empowering individuals to take on future leadership roles – thus enabling the community to respond quickly and effectively to community needs and challenges.

Knowing that no single organization can have sufficient impact to achieve our ultimate goal and desired legacy, we will also encourage, facilitate and participate in ongoing networks of communication and collaborative action on behalf of the creative arts community.

Objectives

- Help ensure that Creative Trust companies continue as a “community of learning,” benefiting from the development of skills and sharing of experiences and best practices
- Maintain the ability to assist Creative Trust companies in times of leadership change, financial set back, or artistic reevaluation
- Identify, nurture and develop leaders within the community who will powerfully speak and work on behalf of the well being of Toronto’s performing arts companies
- Facilitate ongoing networks of individuals and organizations devoted to developing and supporting a vibrant creative community in Toronto and beyond

Partners

- Community: The Culture Group (ArtsBuild, Artscape, Business for the Arts, the Municipal Cultural Planning Partnership), Creative Space Enablers Network, TAPA and other arts service organizations, Emerging Arts Professionals, CCCO, arts funding bodies, the George Cedric Metcalf Foundation,

other key private sector arts donors, Centre for Social Innovation, ONN steering committee and members, and city builders (such as Toronto City Summit Alliance, United Way and others)

- Government: The Canada Council for the Arts Equity Office, City of Toronto's Department of Economic Development, Ontario Ministry of Culture, Department of Canadian Heritage
- Resource Partners: Lantana Consulting Group, BMO Financial, Great-West Life Assurance, other private sector donors

Plan of Action

Objectives: Help ensure that Creative Trust companies continue as a “community of learning,” benefiting from the development of skills and sharing of experiences and best practices; maintain the ability to assist Creative Trust companies in times of leadership change, financial set back, or artistic reevaluation

Activities

- Continue offering seminars, workshops, roundtables and other learning and skills development opportunities (in addition to those presented as part of the Toronto Theatres Initiative and Growing Audiences Project) to Working Capital, Outreach companies, Stand Firm organizations, and other interested community members. These will include: G.S.T. and other financial workshops; a session on preserving theatre and dance legacies (including archiving and the Performance History Data Base with Danny Grossman Dance Company); a fundraising session (with Jane Hargraft of Opera Atelier); etc.
- WITH PARTNERS, collaborate on presenting these learning activities wherever possible; identify partners who can continue this work past Creative Trust's sunset
- Continue to offer, as needed, the one-on-one coaching and mentoring that have been an essential part of Creative Trust's success
- Develop Creative Trust's data base, website Members' Pages, and other communications systems in order to be better able to bring people together, virtually and actually, to learn and collaborate
- Develop regular email updates on Members' Pages resources and other learning activities
- Continue communications about our members and our work (including our twice-yearly newsletter and annual evaluation reports) that are attractive, lively, interesting and informative – expand their distribution to include key influencers and media

Objective: Identify, nurture and develop leaders within the community who will powerfully speak and work on behalf of the well being of Toronto's performing arts companies

Activities

- Begin our leadership development activities by offering Simon Heath’s workshop on Speaking to Inspire: effective communications and presentations to selected individuals within Creative Trust
- Select individuals to lead or make presentations at Creative Trust seminars, workshops and roundtables; highlight their work and ideas in our newsletter and other communications
- Offer support and mentorship, both personally and through Creative Trust, to prospective leaders
- WITH PARTNERS, collaborate with other organizations offering nonprofit leadership development programs and activities

Objective: Facilitate ongoing networks of individuals and organizations devoted to developing and supporting a vibrant creative community in Toronto and beyond

Activities

- Consciously bring organizations together, facilitating links, communications, gatherings and opportunities for shared action
- WITH PARTNERS, work closely with colleagues whose mission is to strengthen and support arts organizations and cultural activity in the City of Toronto and the Province in order to achieve our objectives
- WITH PARTNERS, reach out to community colleagues such as funding agencies across Canada, foundations and their service organizations, capacity builders, city builders
- WITH PARTNERS, integrate the arts community into Ontario Nonprofit Network, a province wide network of nonprofit social benefit organizations formed to identify common issues, act together and strengthen the sector; ensure that arts organizations are aware and involved in this nonprofit network
- In Fall 2010 create a network map tracking Creative Trust’s partnership networks, for our members and key partners’ information and future.

New Strategic Initiative: Sharing and Mentoring

Sharing was an original objective of Creative Trust, and since the beginning we have responded to requests from funders, arts service organizations, and peers in arts and other sectors across the country to share our learnings and outcomes.

We are frequently invited to talk about the structure and content of our program with arts groups and funders from other disciplines and municipalities, interested in using Working Capital for the Arts as a model when undertaking their own sustainability programs. We will continue to respond to these requests.

Objectives

- Bring the lessons of Creative Trust to other arts disciplines and sectors.
- Help to move the Creative Trust experience to other geographical areas.
- Sponsor, incubate, and assist with new capacity building initiatives and opportunities.

Partners

- Government: While these activities would be done on a cost-recovery basis, with Creative Trust serving as the “change consultant,” recovering its costs, including staff time, through fees, we will need overall support from partners including the Ontario Ministry of Culture and the Department of Canadian Heritage, and project support from the Ontario Arts Council’s Compass Program.
- Other partners: The Trillium Foundation (which has expressed interest in Creative Trust advising on the establishment of arts sustainability programs province-wide), The Toronto Arts Council, Picasso Pro

Plan of Action

Objectives: Bring the lessons of Creative Trust to other arts disciplines and sectors; help to move the Creative Trust experience to other geographical areas

Activities

- Act as “change consultant” to selected sustainability initiatives: advise them in seeking project funding, assist them in exploring feasibility; provide guidance and direction to their projects as requested
- Be available to facilitate meetings, conduct workshops, and speak at seminars

- Develop a Power Point presentation and other materials about Creative Trust’s programs, methods and results
- Use the Literary Press Group as the pilot project for working with other arts disciplines (the LPG has identified a funder and applied for support to study the feasibility of a capacity building and sustainability initiative for small publishers)
- Use the City of Ottawa as the pilot project for working with other municipalities (the Ottawa Arts Council has secured funding and asked Creative Trust to assist with a sustainability program patterned on our Outreach Initiative)
- Continue to respond as possible to requests by other cultural clusters, arts service and membership organizations, and nonprofit groups to assist with sustainability projects and issues.

Objective: Sponsor, incubate, and assist with new capacity building initiatives and opportunities

Activities

- Encourage, mentor or sponsor, as appropriate, selected complementary sustainability initiatives
- Explore the possibility of partnering with the Toronto Arts Council on a pilot project to increase the fundraising skills and capacity of small to mid-size arts organizations
- Explore the possibility of becoming project trustee for the independently managed, programmed and funded arts disability project, Picasso Pro