



ONTARIO ARTS COUNCIL  
CONSEIL DES ARTS DE L'ONTARIO

# **RE-GENERATION**

THE HEALTHY ARTS LEADER

**Report on the  
Ontario Arts Council's  
Arts Management Conference**

**Breakout Sessions**

**February 6 and 7, 2005**

**Prepared  
by Carolyn Mackenzie**



ONTARIO ARTS COUNCIL  
CONSEIL DES ARTS DE L'ONTARIO

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# BREAKOUT SESSIONS

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## **Breakout Sessions – Sunday, February 6, 2005**

**The materials reported for the breakout sessions were provided by session leaders and with the contributions of session recorders: Anna Azraimi-Hamedani, Denise Bolduc, Pat Bradley, Robyn Chan-Kent, Lorraine Filyer, Maxine Francis, Rebecca Gimmi, Sasha Havlik, Risa Kusumoto, Cynthia Lickers-Sage, David Parsons, Erica Proudlock, Robin Sokoloski, Annie Tse, Carolyn Vesely, and Myles Warren.**

### **Peer Breakout Sessions**

Peer breakout sessions were designed to allow varying generations of arts managers to discuss and exchange ideas on issues that were relevant to their grouping.

### **Peer Breakout Session A 1, 2 and 2.1**

Peer breakout sessions A1, 2 and 2.1 were designed for managers with 0 – 5 years of experience. The goal of these sessions was to develop a wish list regarding mentorship from an emerging manager's perspective.

The participants in each group were asked to network with a partner. Each participant then reported back to the whole group on their partner's behalf, answering the following questions:

1. What is your name?
2. What did you do for yourself today?
3. What was your best experience being mentored or being a mentor?

Each group then developed their wish list or thoughts on mentorship.

### **Peer Breakout Session A1 – led by Carol Greyeyes**

**The common themes in Session A1's wish list are the following:**

- Desire not to bureaucratize mentorship.
- Ability to access a variety of mentors throughout one's career.
- Mentoring that supports personal and career development.
- Building mentorship exchanges that are reciprocal and are founded on mutual respect of the participants.
- Hands-on learning.

- Ongoing, flexible and long-term relationships that reflect varied learning styles and are measurable.
- Shadowing opportunities.
- Mentors who champion mentees.
- Networking opportunities.
- Providing support and constructive feedback.
- To be challenged and pushed beyond one's limits.
- Open and candid relationships.
- Part of everyday work, not outside of the work schedule.
- Respect for differences in style.
- Mentors who care about the person's entire well-being.
- A small workgroup of developing arts administrators and experienced arts professionals.

## **Peer Breakout Session A2 – led by Ottie Lockey**

### **Common themes of mentoring: A good mentor**

- Challenges you to think outside the box.
- Listens.
- Is supportive and helpful.
- Enjoys teaching.
- Loves to share their expertise and knowledge.
- Transfers past lessons and experiences.
- Gives tools and a foundation for mentees to learn and look at issues from a professional perspective.
- Treats mentees as an equal and with respect.
- Encourages mentee to push him/herself.
- Gives positive advice.
- Is not afraid to admit a mistake.
- Sets goals.
- Is fun.
- Is understanding when intern makes an error.
- Provides an ongoing relationship with the intern.

### **A mentor is beneficial because he/she can**

- Increase the intern's confidence.
- Have the intern look at issues from a professional perspective.
- Have the intern emulate the boss's style.

### **Challenges seeking a mentor:**

- Many from the group voiced they did not have a real experience or a positive experience from mentoring.
- They often seek mentors from friends.

- A formal mentoring program was suggested so interns will not rely on friends.

In conclusion, Ottie suggested asking questions, talking to people and mentioning your interest in mentorship in job interviews. At the initial meeting with a potential mentor it is important to get to know each other and determine what is required.

## **Peer Breakout Session A2.1 – led by Andrew Taylor**

### **What does it feel like to be a mentor?**

- Demonstrated by networking and introducing other group participants in the session's opening exercise.

### **Participant's voice:**

- It is positive to have ongoing response and feedback.
- Keep asking questions – maintain heated interaction.
- Getting to know each other is important.

### **We want deeper mentorship; but what does that mean exactly?**

#### **Definition:**

- Multi-directional.
- Long-term.
- Personal as well as professional relationship.
- Not necessarily integrated with career as with coaching.
- Spiritual – receiving of wisdom (not just skills).
- Holistic approach to both career and personal development.
- Spotting and nurturing the talent.
- Trust is an essential element for rapport.
- Inspiration to move forward for both parties.
- Shared experience – agreed on by both parties.
- Altruism – mentor may gain nothing but satisfaction.
- Are we calling “mentorship” what used to be “apprenticeship”?
- “Guardian angel” to help open doors.
- Business model: mentors select their mentees, to carry on their tradition.
- Mentors have nothing to gain or lose, they participate to contribute.
- Being a good manager does not translate to being a good mentor.
- Both parties benefit over the long term.
- Mentoring helps one learn about the younger generation.
- People mentor people – that is, individuals not organizations.
- Passing the torch and one's love of the business.
- Length of mentorship can be flexible, depending on needs of parties.
- Mentorship can bridge the generational divide in both directions.

- Can mentorship be government led? Possibly, but not a replacement for training.
- Good mentors have to be able to trust and pass along.

### **What is missing?**

- Missing out on possible relationships by being narrowly focused.
- Size, cost and time restraints of many organizations (particularly small ones).
- Concern about the work getting done once committed to a mentorship.

### **What can we do?**

- Networking and finding appropriate mentors.
- Without time or money to participate in training and professional development, mentorship becomes an important part of the sector's ecology.
- Funding is needed to coordinate and find mentors and mentees.
- Sharing of good practices: ad hoc groups of arts development people to discuss, explore, learn; there is always someone else doing just what you do.
- Support mentoring: peer-to-peer mentoring.

## **Peer Breakout Sessions A3 and A4 – led by Joysanne Sidimus and Catherine Smalley**

Peer sessions A3 and 4 were held together. This group reflected managers who have 5 to 10 years' experience. This group was asked to identify areas of potential change in order to retain existing arts leaders in the system.

### **What was our expectation when going into this job?**

- Steady income.
- Create support for artists.
- That it would never be boring.
- That the job would be temporary.
- Learn enough to self-produce.
- Work toward community building.
- Show relevance of art in the community.
- Make a difference and have a meaningful job.
- Help create jobs for artists.
- An opportunity for growth development in the job.
- To participate in the arts without having to be an artist.

### **What is the reality of the job?**

- You define your reality. It is possible to make it happen if you want it to.
- Arts organizations are having a huge impact on smaller communities.
- Grants get cut, struggle with the government because they don't realize what art does.

- There are not enough human resources.

### **What are the challenges?**

- It is difficult to sustain momentum, everything happens at a slow rate.
- The structure of the organization is always confusing. The company keeps growing but the administration is not fully supported.
- There are a lot of people who are arts managers and do not have a formal background in arts administration.
- It's difficult to find the next step within the organization. There isn't any leverage within arts sectors.
- Certain people felt that they get asked to sit on several boards and committees. Time is being taxed.
- An arts manager is expected to be proficient at many different managerial tasks. It is difficult to find the time to take courses.

### **GROUP BREAKOUT DISCUSSIONS:**

What would you like to see happen in the future to energize the field?  
What has to change? Who is accountable?

#### **Group A:**

- Long-term stability in administration staff.
- More feedback from funding bodies so that organizations know what is realistic and expectations are clear.
- Longer-term training grants.
- Dedicated funding for administration and operating.
- Time and money to put toward ideas and projects.
- Job sharing and/or paid sabbatical possibilities.
- Involve all stakeholders in order to support HR development.
- Longer-term internships.

#### **Group B:**

- Fear of change needs to be minimized (staff and Board).
- Ageism needs to be dispelled. There needs to be mutual respect between young and old.
- There needs to be a greater respect of time.
- Innovation and a sense of change will create momentum and fuel passion.

#### **Group C:**

- Non-financial compensation and benefits to staff.
- Access to professional development resources.
- Support organizations for artists – health networks.
- Raising profile and perceived value of the arts.
- Workable, flexible organizational structure.
- Sufficient human resources.

- Long-term mentorship and internships.

#### **Group D:**

- A better work-life balance.
- Challenge of seeing 10 years ahead.
- Develop a profile for arts managers. A job description.
- There should be ASO strictly for arts managers.

#### **Do we feel valued?**

- We should recognize and value arts administration the way artists value art.
- As artists we do administration when we can't do art – administration is not viewed as important or valuable.

#### **Is it okay to be an arts manager?**

- Attempts at making your organization a success are never-ending; there are always more grants to apply for and projects to do.
- Good governance plays a role in administrators being respected.
- Boards need to allow managers to manage.
- Careful Board development.
- Good arts managers know the artistic vision and know how to advance the vision.
- Undertake to communicate our needs and interests more clearly.
- Increased education early on would help in the future of arts management.
- Draft a job description for yourself and present it to your bosses, seeking input.
- Communication – and lots of it is essential.

### **Peer Breakout Sessions A5 and 6**

Peer Breakout Sessions A5 and 6 were designed for managers with more than 10 years' experience. These groups were asked to identify strategies for a smooth transition into the next generations of arts leaders.

#### **Peer Breakout Session A5 – led by Jocelyn Harvey**

The session was organized into three parts, with participants discussing each point as follows:

#### **Regarding experienced leaders who are leaving organizations, what are you looking for and are your environments providing for this?**

- Suggestion to have retirees available in some capacity, perhaps as consultants:

- a. Are people forced to become consultants because they haven't received a living wage, are not able to retire?
- Suggestion to encourage people to be financially educated.
- It is also important to look at the barriers to leaving, such as retirement planning:
  - a. Suggestion to incorporate RSPs into the long-term planning in institutions.
  - b. Suggestion to use surplus funds for RSPs, but also suggestion to put RSPs directly into the budget.
  - c. There is a need not to wait, but to treat employees professionally, and to treat their benefits as legitimate expenses.
- Preparing to retire means bringing in someone else:
  - a. How do we make sure our successors can truly take our place?
  - b. How do we make the transition smoothly?
  - c. Is there money to pay for an overlap period?
- What happens if your Board of Directors (BOD) decides you should retire?
- Example of offering a five-year notice, start planning.
- Discussion on founder-based organizations when founder retires:
  - a. Suggestion to create other positions to take over after artistic founders of organizations (seeing many organizations fail when artist founder retires).
  - b. Often succession plan for the artistic directorship, but not the administrative/management side.
- Suggestion for organization to be financially prepared for the overlap:
  - a. Bring in a change manager specifically for the interim period? This gives time to bring in new person or renew role or vision.

### **Regarding upcoming leaders, what do they need?**

- Suggestion to look to other industries' recruiting:
  - a. Hire and train young people to prepare them for succession.
  - b. Have the mindset that you can give someone a chance, and begin preparing them.
  - c. Suggestion that sabbaticals can offer good experience for upcoming leaders.
- Need to have clear policies, infrastructure and job descriptions in place for succession:
  - a. Suggestion to add governance and succession to an annual planning checklist with the BOD.
- Should executive directors (EDs) present successors to BOD? Whose responsibility is it to raise the issue of succession planning?
  - a. Everyone agreed that EDs or senior leaders are responsible for this.
  - b. Everyone also agreed that boards may need to initiate the discussion of succession planning.

- c. How do EDs and BODs make sure that leaders *and* upcoming leaders go through leadership training programs?
- Discussion on legitimizing the field of cultural management:
  - a. Is there a place for certification in arts administration?
  - b. Participants were split on the merits of certification.
  - c. Warning not to downplay professionalism in administration for finances, health, safety, etc.
- Discussion of organizations continuing; is the money there to start new institutions or organizations for young people to lead?
  - a. Suggestion that younger generation looks to more virtual communities and collectives.
  - b. If institutions were created to draw more resources together to promote artists' work, what happens when artists can do much of it themselves due to technology?
- Discussion of the difficulties of young managers:
  - a. Especially in the visual arts, shallow structure organization where there is no expectation of succession.
  - b. No middle management training ground in many organizations.
  - c. Do cultural BODs tend to look at the CEO as a commodity, to perform or get out? Are new leaders brought from outside the organization?
- The complexity of organizations supports the shallowness of people's experience if they don't have the opportunity to develop new skills.
  - a. See young leaders moving horizontally between organizations for experience.
- Should BODs look at durability as a liability?
  - a. If senior leader is repository of all past information and history, what happens when they retire?
- Suggestion we might be nurturing too many arts managers, not enough money to spread around.

**Regarding the point of view of the organization, what are we planning?**

- Discussion about whether the organization meant the BOD or not? Do they listen to cries for help?
  - a. Examples of people giving five- to ten-year retirement notices, what is done by the organization?
  - b. Warning that BODs turn over, not to entrust all responsibility to them.
  - c. Should ex-BOD members be approached for management positions?
- Need for ED/BOD to delegate responsibility to prevent the repository syndromes.
- What means are available to transfer the history and information of the organization?
- Suggestion to make policies to communicate with juniors:
  - a. Start training with information so people know how their organization works.

- b. Activate the finance and fundraising committees, so they know how to take on those roles.
- Everyone agreed that planning and communication are key to successions.

## **Peer Breakout Session A6 – led by Robert Sirman**

### **Introduction**

- All participants introduced themselves by name, occupation, basic training:
  - a. Looking for connection between occupation and education/training.
  - b. There are many ways to encourage young people to be leaders in the arts; they don't necessarily have to be trained as arts administrators.
  - c. Result: 2/3 of people in the session have been trained in the arts.  
1/3 of people in session have been mentored.

### **Issues of Succession (Human Resources):**

- Difficult to find new people to work in difficult circumstances: excessive hours, low wages and benefits, high dedication.
- Work with passion, belonging.
- Over-dependence on specific leaders.
- How to make an organization inheritable.
- How do arts administrators give up control? "You can do it, but do it my way."
- Who wants to buy the existing commercial cultural assets?
- Founder's syndrome:
  - a. When an entire staff consisted of two or three people it is difficult to find people who are experienced in that institution who can take over.
- Board recruitment (both professional and volunteer leadership).
- Who can afford to retire?
- Need for personal sanity.
- No assistant positions.
- Difficulty in keeping people long enough to assume leadership.
- Mindset of community:
  - a. "Art = no prospect" perception.
  - b. Lack of role models in the arts to inspire people.
  - c. Need to inspire and attract people with passion, not money.
- Organizational mentorship: passing on mantle to new organization.
- Geographic: culture within cities and urban centres.

### **Proposals for Action**

- Create the climate the next generation wants to work in.
- Develop the capacity to bring in more people, which is difficult in smaller organizations.

- Define desired competencies and credentials for positions reporting to the Board.
- Boards should do more succession planning for organization.
- Create assistant positions, from which the assistant will be chosen for succession.
- Create closer personal relationships with practitioners.
- Clarify position description: people can then know what the boards expect.
- Open up to other ways of working:
  - a. New ideas, new goals.
  - b. Think outside the traditional workplace setting (e.g., job sharing, telecommuting).
  - c. Workers don't have to be arts-educated.
- Credentials: increase credentials and recognition of community in the arts.
- Be less afraid of other people knowing what we are doing.
- Learn from experiences of other sectors.
- Reinforce our professionalism.
- Emphasize "creativity" that can benefit other sectors.
- Artistic leaderships need to align with artistic vision and management of organization (requires investment of time and energy).
- Change Board's thinking and understanding.
- Make our jobs easier; make it attractive to replace and fill.
- Value your own time: budget for it.
- Create action plan to "push back" and relieve chronic crisis in the long term.
- Build changes in approach into strategic plans – this requires buy-in from artistic leadership.

## Subject Breakout Sessions

### **B1 – Managing Change – New Tools for Managers – led by Beth Anderson and Tricia Baldwin**

A Case Study of Tafelmusik's organizational expansion and the new tools required for those changes.

Please note that the templates for the "new tools" are available at the "Online Resource Centre" of the Orchestras Canada Web site at <http://www.oc.ca>.

**Tafelmusik Baroque Orchestra and Chamber Choir**  
**WELCOME**  
to  
**Managing Change:**  
**New Tools for Managers**  
Sunday, February 6, 2005

**Tafelmusik Baroque Orchestra**  
Jeanne Lamon, Music Director

**Tafelmusik Chamber Choir**  
Ivars Taurins, Director

- Areas of Artistic Activity**
- Home Performance Season
  - Touring – International, National, Provincial
    - Artistic Partnerships
  - Outreach and Community Partnerships
    - Education
    - Artistic Training
    - Recording

**Tafelmusik Eco-System – Our Family of Constituencies and Stakeholders**  
**Tafelmusik – International Centre of Excellence in Period Performance**

<ul style="list-style-type: none"> <li>• Tour Agents and Presenters</li> <li>• Local Artistic Partners</li> </ul>	<ul style="list-style-type: none"> <li>• CD and Documentary Partners</li> <li>• Local and International Media</li> <li>• Radio/Television Broadcasters</li> </ul>	<ul style="list-style-type: none"> <li>• Education Partners</li> <li>• Artist Training and Orchestra in Residence Partners</li> </ul>
<ul style="list-style-type: none"> <li>• Government Funders (Canada, Ontario, Toronto arts councils and DFAIT)</li> <li>• Creative Trust</li> </ul>	<ul style="list-style-type: none"> <li>• Venue/Home Partners</li> <li>• Architectural Partners</li> <li>• Capital Campaign Partners</li> </ul>	<ul style="list-style-type: none"> <li>• Subscribers</li> <li>• Single Ticket Buyers</li> <li>• Individual Donors</li> <li>• Corporate and Foundation Donors</li> <li>• Community At Large</li> </ul>

**CORE VALUES**

**Artistic Excellence**

- Long-term, nurtured relationships
- Commitment to artistic mandate
- Artistic integrity in short- and long-term decision making
  - Organizational excellence
  - Fiscal responsibility

**Desired Future**

- We always want to be one of the best period performance orchestras in the world.
- We always want to attract the best musicians and arts managers.
- We want to have a great environment for our artistic-staff team with the proper resources to realize our vision.

**Future Vision**

In planning for the future in 2000/01, Tafelmusik identified its vision to be an internationally recognized centre of excellence for many generations to come.

We therefore realized the need to create:

- future world-class period performance musicians, and
- audiences for the future.

## Expanding Activities

To create artists and audiences for the future, Tafelmusik developed programs to:

- train the next generation of period musicians
- expand the scope of recording activities
- expand artistic and community partnerships
- create audiences for the future
- build financial resources

## Opening Doors to Tafelmusik

- More accessible, beautiful and comfortable home venue with superior acoustics.
- Artistic training and education.
- Multidisciplinary and cross-cultural festivals and programming.
- Satellite venue and community concerts.
- 24/7 access, ticketing, and learning through the internet.
- Increased international awareness.
- Audience development through television, recording and multimedia.
- Diversity initiatives.
- Opportunities to volunteer and get involved.

## Challenges in Our New World

- **Price for worthwhile expansion** in artist training, education, community outreach was paid by a high level of stress on the staff and artistic team and turnover in operations staff.
- Tafelmusik was also dealing with transitional issues and **institutional knowledge loss**.

## Defining the Problem: "Ross's Respectful Suggestions"

Tafelmusik needed:

- a method to retain institutional knowledge of Tafelmusik-specific operational planning and procedures – with training, succession, job satisfaction and performance in mind
- better role definition in a matrix organization
- a centralized, shared information source vs. "siloeed" file source and idiosyncratic planning/budgeting tools

- better project management tools/templates/prompts to handle expanded and high-volume areas of activities rather than reinventing the wheel each time an activity was planned (e.g., tour, runout) and forgetting details
- a better tie-in between strategic planning and operational planning.

### Developing Solutions

- Artistic and administrative excellence and relationship-building have been the cornerstones of Tafelmusik's success.
- New tools offered an opportunity to close the gap between our vision and our operations:
  - Project Management Initiative
  - Human Resource Planning
  - Revised Job Descriptions more limited in scope, more reflective of standard arts job descriptions

### New Tools

In a solution-finding mode, Tafelmusik applied for and received a grant for professional development in Project Management from the Cultural Careers Council of Ontario to work with Project Management Consultant Ross Smith.

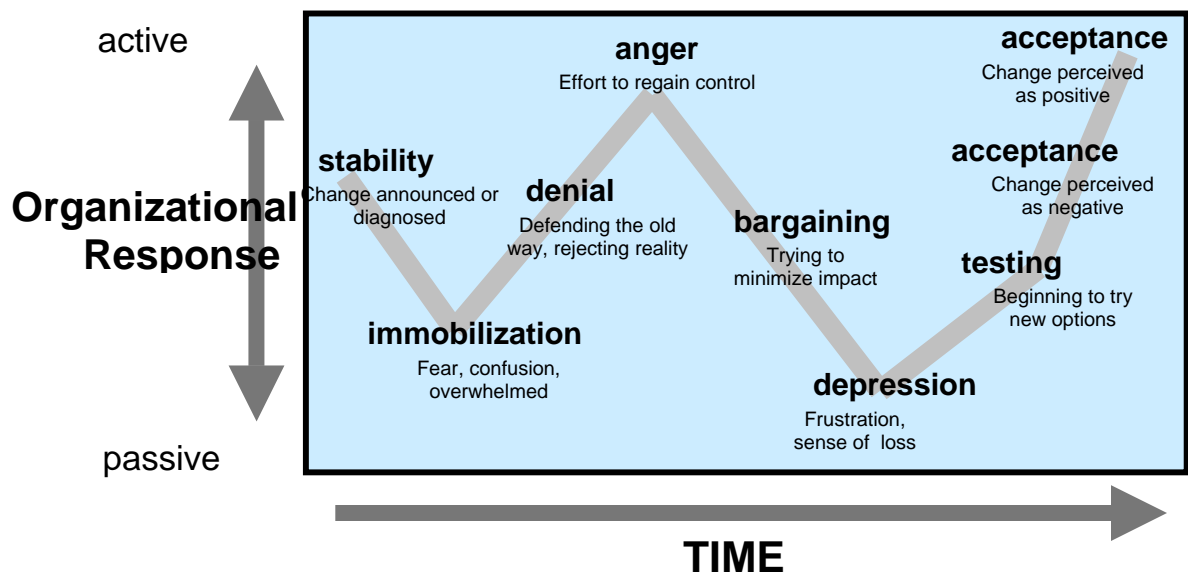
### Key Principles of the Project Management Initiative

1. An arts organization's commitment to **artistic excellence** must be **matched** by a commitment to **organizational excellence**.
2. This Project Management initiative is consistent with the organization's values of creating a **nurturing, caring environment** for our artists, staff and volunteers and also with the goals and priorities set out in the strategic plan.
3. This Project Management initiative speaks to the **core strengths required** in the **quickly evolving environment**.
4. The need to acquire and develop human resources, organizational, **project management and coaching skills** is helpful to an arts organization's **continued success**.
5. Longer term, there will be a need for "**skills transfer**" to **succeeding staff**. Establishing a **permanent base of institutional knowledge** allows the arts organization to transfer to new staff a solid base of best practices.

## The Response to Change

- Let's Do It!
  - I'm inspired, excited
  - I'm completely sold
- I'll Go with the Flow
  - I'm not sure but I'll go along
  - I like the change but can we really do it? How will we do it?
- Freeze
  - This will never work
  - I'll keep my head down and it will pass
  - I'll work on other priorities or interests
- Over my dead body
  - This is my turf
  - I will take action to prevent, to sabotage

## The Response to Change



## Project Management Templates

- Tafelmusik developed a number of detailed templates for specified projects that will prompt staff as to the work that needs to be done, when it needs to be done by and who does it/who is communicated to.
- This was especially important for touring as the level of detail is extensive and the information very specific to Tafelmusik. Instead of semi-reinventing tour

planning with each tour, the operations team can now pull up the template and adapt it for the specific tour.

- The model which seems to be most applicable is the GANTT chart which is basically an Excel spreadsheet with the activities, timelines and people involved outlined.

### **Project Management Templates**

- Touring.
- Contracting.
- Joint Ventures with Opera Atelier.
- Tafelmusik Baroque Summer Institute.
- Marketing (Subscription and Single Ticket).
- Development/Fundraising.
- Special Event Gala.
- Volunteer Management.

### **Orchestras Canada Soundings Assessment 2003**

- To help build a healthy future for orchestras, Orchestras Canada needed to create a national source of shared tools for best practices in arts management.

### **Sharing Our New Tools**

To help developing administrative excellence in arts management, Tafelmusik has shared all project management models with:

- orchestras through Orchestras Canada (posted on the Orchestras Canada website – [www.oc.ca](http://www.oc.ca))
- mid-sized arts sector through Creative Trust
- Schulich Arts and Media Program (MBA)
- Income Managers Program
- Waterloo Arts Administration Program

## **B2 – Arts Management 101 – led by Melanie Fernandez and Natalie Lue**

A workshop designed for emerging administrators that offers an introduction to unions and professional associations, ASOs, agents and government agencies.

- These organizations are valuable resources, so it is in the interest of young administrators to create relationships with them.
- Arts administrators who decide they want to work with unions should be familiar with all relevant contracts.
- Some people believe unions are created out of necessity; however do they really address issues.
- Arts Service Organizations (ASO) mandates vary but the three key areas are to promote advocacy, professional development and communications networks. ASO also offers support such as job descriptions, and where to look for funding and other resources.
- Arts administrators should think in broader terms than their own discipline when it comes to ASOs because many of them work with multidisciplinary organizations.

### **Top Ten Issues of Arts Administrations**

1. Funding – public sector.
2. Human resources – demand for volunteers, staffing overturns and unions.
3. Industry support.
4. Artist relationship – nurturing of.
5. Ongoing professional development.
6. Audience development.
7. Personal health – burnout.
8. Facility management.
9. Organization missions or goal.
10. Art form /Art – context.

### **Tips to finding funders**

1. Look at programs, brochures from shows or/and events to find out who are the sponsors.
2. Look at corporations and foundations' Web sites.
3. Local businesses.
4. Arts councils – federal, municipal and provincial.

### **Art Funders: Government**

DOCH	Department of Canadian Heritage
HRDC	Human Resources Development Canada
OTF	Ontario Trillium Foundation

MOC Ministry of Culture (and perhaps at other issues-related ministries such as Recreation, Education, Francophone and Aboriginal Affairs)  
DFAIT Department of Foreign Affairs and International Trade

- Tourism funds through municipal and provincial governments.
- Youth project funding through social services (municipally) and Corrections Canada.
- Other foundations for northern communities such as Northern Development and Mines.
- Aboriginal employment, Aboriginal Business Canada.
- Casinos.
- Other foundations – Metcalfe, Laidlaw, McConnell, etc. – and corporate foundations – RBC, CIBC, Imperial Oil, Imperial Tobacco, etc.
- Foreign consulates.
- Other agencies, United Way, etc...

A handout, *Glossary of Canadian Arts Acronyms*, produced by Janis A. Barlow and Associates, was given to the session participants. The glossary can be found at

<http://www.barlowandassociates.com/Glossary%20of%20Canadian%20Arts%20Acronyms.PDF>.

### **B3 – Exploring Partnerships – led by William Moore**

A working session to explore and suggest ways to develop relationships and partnerships with business, community service organizations, individuals and government agencies.

The introduction to this session involved working with images:

- Working with “sense of self,” draw your organization.
- How do you make connections?
  - a. Computer.
- Connections with funders?
  - a. E-mail or phone.
  - b. Membership serve, publishing.
- Picture your position: (William stressed the importance of pictures.)
  - a. Bubbles in the centre and interaction with other bubbles around – e-mail.
  - b. Target with self in centre.
  - c. Flower pattern with petals representing different HR components.
  - d. Central circle with rays.
  - e. Rectangle with organization, city, audience and schools at each corner and arrows indicating matrix flow to and from each corner internally and externally.

- f. Not myself in the centre – but a function of getting audience to be part of you.
- William asked for stories:
  - a. Everyone is what she “juggles” and tries to bring them all in.
  - b. Building the family of various people from different groups.
  - c. It is a line, where people are part of the line.
- Issue of “partnership” is that all of us are “creative” cultural workers:
  - a. “Fodder” of economy – e.g., Microsoft workers are involved in the arts.
  - b. Creative workers flocking to the centre of the economic cycle – why?
  - c. Creative choice can be made by people who want to make a difference – choice is moved forward with communication.
- As culture workers we are strong in our ability to “read the feeling” – we are constantly reading the next reaction.

**Session leader presentation is in borders, recorder notes are noted as addendum:**

A working session to explore and suggest ways to develop **relationships** and **partnerships** with business, **community** service organizations, individuals and government agencies.

So what does this mean to you?

What do you want to know, to have happen?

**Q:** Session title – what does this mean to you? What do you want to know, to have happen?

**A:** We need workers, source, community, and time to network and revise.

- We have three types of people – each seeing the world differently:
  - a. Artist / leader – sees the horizon, what is beyond.
  - b. Crafter / connector – sees the middle road.
  - c. Technocrats – look down.

Those of us who filled out the OAC questionnaire for this conference saw the question:

**Are there any suggestions that you would like to make regarding subjects for working sessions or speakers?**

### **To which I replied – in part...**

What is most notable missing in your (OAC's) questions is the individual. Organizational success begins with the individual, as does its failure. A responsible HR plan will not make an institution viable. It will help, but it is not "it". It – is the person: the cultivation of the person, and the environment in which the person can make a difference. We are living in a new economy (yes, and there will be still newer economies) and the prototypic difference? – creative individuals are driving the bus. Creativity is the main economic force and creativity is intrinsic to success in business. People are the raw materials of a creative age. It is clear that arts organizations have flourished from the creative person. That person is usually thought of as the performer, the arts, the curator, the artistic director... but dig deeper, there are others. We need to invest in the basic creativity of individuals. Business is!

However, inward is not the only issue at hand in the "regeneration of the arts leader." The arts organization's relationship beyond its, let's say, container – is also vital. Thinking beyond the mandated artistic program and direction is often difficult. That program executed within a healthy organization by a capable and supported "arts leader" is truly a core competency.

A core competency, as well, is also the relationship of the organization to its larger "container" – its community. This is a pliant point; varying by the size of the community and the character of the program delivered. Nevertheless, I believe "a new working model" cannot be considered without earnest institutional commitment to a responsible, participatory, and creative relationship with community.

- Our communications and body language are tools.
- "Individuals are driving the bus"
  - a. Each one of us wants to express ourselves within our organizations.
  - b. We all have a lot to offer.
- However
  - a. This is often difficult to support.
  - b. This varies by size of community – "container" is what should be watched.

### **Key Words:**

**Container – Community – Relationship**

## Container

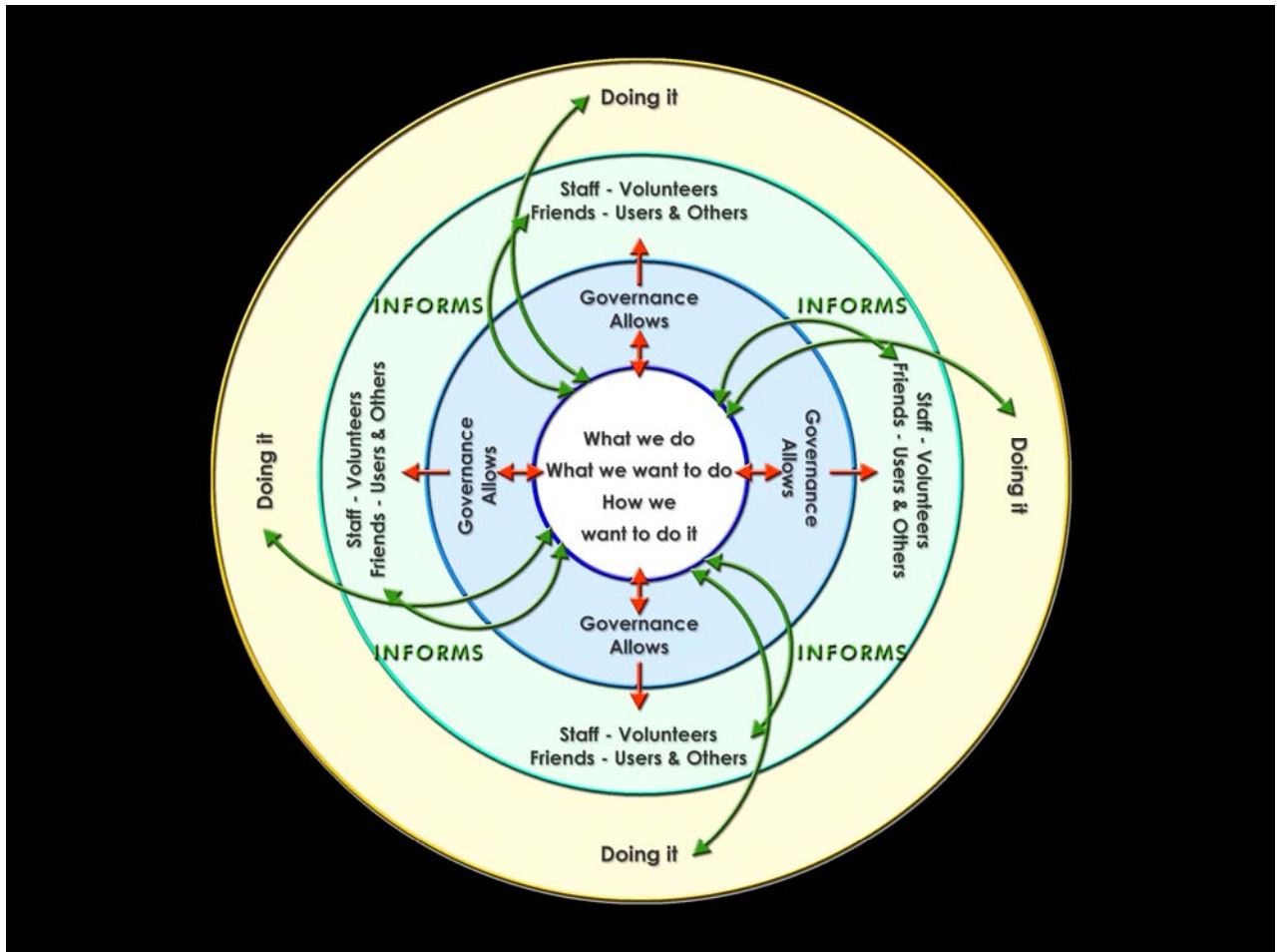
The Organization, your organization is the first container – think of it as the smallest doll in one of those Russian dolls within dolls folk-art.

Better still, think of yourself as the first doll nested in the next doll – your organization.

YOU and the next doll up are the container for **Meaning** of your Organization.

### **Meaning – some quick thoughts.**

- We are in a container – that is in a larger container, e.g.,
  - a. 1<sup>st</sup> container = family,  
2<sup>nd</sup> container = organization,  
3<sup>rd</sup> container = society.
  - b. Artist,
  - c. Stakeholder, i.e., everyone involved and who you are communicating to.
- Container is your organization:



## Meaning

1. Meaning must be understood within the organization first – both in reality and where the organization wants to be.
2. Meaning is really a bundle of meanings – lots of things that the organization does, is mandated to do, and (very important) – **Believes in** – these become the organization's **Value**.
3. Value is meaning – and meaning is value *unpacked*.
4. The “brand” (whatever is used) is one of the containers for those meanings and should be able to be associated to Meaning in terms of Value.
5. Gender, class, age, ethnicity, lifestyle cannot be ignored in managing meaning – each decade is a mini-culture; so approaches and connections always need reconsideration.
6. The Meaning toolbox includes product (or value) identity that is associated with an image like – “your branding,” that in turn should invoke Value.
7. But it will not unless there are shared beliefs implicit within the organization.

8. Meaning includes connection rituals – principally the *Rituals of Exchange* (how you connect); *Rituals of Possession* (how your organization becomes mine), and, the last is a hard one and can be thought of as adding to the previous – *Rituals of Divestment* (ownership, the giving of the organization to its users and supporters – involvement, participation , it IS theirs!)
9. Ritual meaning is the conversion of the culture of the organization (what it believes, what it does, what it makes, what it wants to do, how it wants to connect, and how it is perceived, how it is good, what is at its soul) into communication and connection by way of an identity – i.e., a brand.
10. This conversation connects the organizational culture with the community or user culture.
11. Users/supporters want meaning: What does your organization mean? (to us, to me and they to me, me to them) and what can it do for me; and perhaps strangely – how is it me, mine (*rituals of possession and divestment*)?
12. Communications is the choice of delivery to create meaning transfer – to gain support, user involvement, and use of service that also results in meaning converted into branding, or: *The containerization of meaning*.

Notes regarding point 10:

- a. Offer what others may benefit from getting from you – allow them to say what they need.
- b. The telling is necessary for your organization to move on with others.
- c. By communicating vision to each other, you must look closely at your own.
- d. Know who you are speaking to and be nice to them.

### End Result

All you do  
Is an opportunity  
For all those you have a relationship with:  
Audience, users, supporters, volunteers, staff, funders,  
Stakeholders, community, business,  
Government...

### The Goals

Increasing experience and the flow of information (Exchange)  
Increase time people are involved (Duration)  
Increase ways to participate (Diversity)  
Increase contributions of time, expertise, and/or money (Depth of Commitment)  
Increase the continuity of connection and association (Ownership)

## A gathering of place



house = organization

**Inside I Keep My... Stuff**  
**Outside I Keep... Community**

## Relationship

Land lies in water; it is shadowed green.  
Shadows, or are they shallows, at its edges  
Showing the line of long sea-weeded ledges  
Where weeds hand to the simple blue from green.  
Or does the land lean down to lift the saw from  
under,  
Drawing it unperturbed around itself?  
Along the fine tan sandy shelf  
Is the land tugging at the sea from under?

*The Map*, Elizabeth Bishop, 1935

## Whose Environment Is It Anyway?

I am going to use some visual art and artists as examples today.

One thought of environmental sculpture or art is that it looks at the natural world as both subject and object. Using, often as a source, the natural materials of place, its mode is to explore the ecological, social, and even spiritual meanings of the environment. Environmental art, when it works, serves as a means of reflection upon our changing relationship with the space around us – our place.

That reflection asks questions about us, about place, and about art and its place in us. There are two responses at work: that of the artist and his or her relationship to the work, and; that of our own and the imposition of the work within “our” space. Each has a context, and it is in the work that they join. Both rely on representation but from different viewpoints.

Environmental art plays with the texture of the things of place along with the texture of the place itself. It becomes a language (or perhaps better, the lack of a language) in situ. Its act of portrayal becomes a negotiation between the real and our response to that reality.

This would seem true of all art – that the gap between the world and its representation lies in the relationship between language and objects; but words are less shaped by their relationship to objects than by their kinship with other words.

- What we create is ourselves and our perception of ourselves.
- What is in a community?
  - a. A sense of place that deals with history and the environment.
- We are the image, living with image – communities can come together with images and art objects.
- How do we make the future different from the past?
  - By bringing the outside in and moving art out into the community.

## **B4 – The Changing Face of Arts Organizations – led by Rudi Quammie Williams**

A working session to discuss the evolution of the arts community to include a greater number of independent artists, artist-run centres, collectives and small non-profits. The discussion identifies the challenges that the sector needs to address in embracing and supporting these changes.

### **What is changing the face of arts organizations?**

- Audiences are driving change.
- Canada is one of the fastest changing countries in the world.
- Diversity has created great change.

### **What challenges are organizations facing in terms of change?**

- Cultural appropriateness:
  - a. Difficult to find qualified administrators that fit into the organization's cultural criteria.
- Lack of infrastructure to support diversely structured organizations:
  - a. Room for professional and amateur artists and art organizations, but nothing in-between.
  - b. Structure of the organizations continually changing and looking at what else was needed to grow.
- Archaic Laws and Censorship:
  - a. Difficulty with censorship.
  - b. Limiting organization in audience development.
- Rapid growth – outruns funding:

- a. Difficult for funders to keep up.
- Non-traditional work arrangements.
- Arts-business hybrids:
  - a. For-profit ineligible for funding.
- Cross-generational staff and Board; increased diversity:
  - a. Youth program to encourage young people to sit on the Board and committees.
- Quickly changing technology:
  - a. Difficulty keeping up with new media because of rapid change of technology.
  - b. More capital expenditures required.
- Balancing Board with artists.
- Changing career paths for artists:
  - a. Career paths evolve rather than develop and grow.
- Increased demands on the administrator. Where is funding coming from?
  - a. Government funding is increasing, fundraising is decreasing.
  - b. Joint ventures.
  - c. Outsourcing: hiring fundraisers.
  - d. More corporate sponsorship.
- Small arts organizations play a bigger role in developing new artists and administrators.
- Disparity between concerns of large and small arts organizations:
  - a. Ability to offer professional development.
  - b. Ability to offer benefits.

### **Growth vs. Funding**

- Corporate sponsorships are vital.
- Creative ways to fund without hiring.
- Money is taking precedence over art.
- Avenues for funding culturally diverse artists outside conventional perception of their culture.
- Time for a paradigm shift.
- Who does the training? Who has the HR budget? Who can offer the incentives?
- Your arts organizations work outside traditional structures and are therefore seeking different funding.
- Organizations are finding new ways to work and new ways to frame their work for funders (collaborations, ad hocs under NFP, service organizations).
- Funding bodies are responding to changes in arts organizations with new programs, despite no new money.
- Interdisciplinary arts abound.
- Different governance models.
- Small organizations fit into newly mandated programs imposed on large organizations.

### **Developing Human Resources**

- Formalize volunteer management, recruitment and use.
- Use of non-monetary incentives.
- Use volunteer base as a succession base.
- Interns and co-op students to become long term and be repeated.
- Barter time and skills with other organizations.
- Collectives and collaborations.
- Mentorships.
- Cluster management.
- Shared resources and staff between organizations.
- Build a useful community.
- Organizational collectives.
- Shared boards.
- Associations to act as advocates.

### **B5 – Performance Management – led by Holly Seebach**

A workshop to introduce various methods of performance management and their value.

#### **Learning Objectives of Session**

- Learning workplace-related information.
- Learning current practices and thinking and trends.
- Learning how to manage human resources in an expanding environment.
- Learning new ideas and suggestions.
- Learning new skills in human resources.
- Learning performance management in volunteer sector.
- Definition of performance management.
- How to implement and execute performance management.

#### **Challenges**

- What qualifies the Board members as employers? What qualifies them to assess performances of staff?
- 360-degree feedback:
  - a. Get feedback from client, peer, managers, self, subordinates.
  - b. Subjective, confidentiality issues, time-consuming.
  - c. Can introduce problems to organization.
  - d. Shouldn't involve compensation (avoid higher stakes).
  - e. Missed opportunity.
- Lack of human resource professionals in organizations.
- Need solid analysis to come up with compensation and job descriptions.
- Assessment is an ongoing process:
  - a. Assess on a daily basis.

- b. Develop relationship and trust.
- c. Document everyone's performance.
- d. Each individual keeps track of his or her own performance by filing performance evidences.

**Strategies:**

- Management by Objective:
  - a. Goals need to be "**SMART**"
    - i. **S**pecific,
    - ii. **M**easurable,
    - iii. **A**chievable,
    - iv. **R**ated/**R**ealistic,
    - v. **T**ime-bound.
- Feedback:
  - a. Specific (the more specific, the better).
  - b. Sincere.
  - c. Objective.
- Managing volunteers:
  - a. Know their goals.
  - b. Coach gently.

**Session leader presentation is in borders, recorder notes are noted as addendum:**

**Performance Management at a Glance  
Presented by: Holly Seebach,  
Principal, Learning Dynamics  
Coordinator, HR Programs Niagara College of Applied Arts and  
Technology**

## **Performance Management**

- ✓ Challenges in Performance Management
- ✓ Terms & Concepts
- ✓ The Process
- ✓ Performance Appraisals
- ✓ Challenges with Appraisals
- ✓ Performance Development Plans

## **Performance Management Challenges**

What are the challenges your organization faces related to performance management?

## **Performance Management**

Performance Management is an ongoing process that identifies an organization's vision and objectives, installs organizational and individual performance standards and ensures these standards using systems and procedures that are well integrated with organizational culture and practices.

## **Why Performance Measurement?**

- Focus on "results/outcomes" rather than behaviours and activities
- Helps the employee understand his/her role in the "bigger picture"
- Depersonalizes issues
- It tells the employee what results (outcomes) are expected of him/her
- Ensures equitable treatment of employees
- Optimizes organizational operations
- Focuses on the employees' contributions to the overall goals of the organization
- Supports ongoing communication, feedback and dialogue about organizational goals
- Performance is seen as an ongoing process rather than a one-time event

## **ADDENDUM NOTES**

- Emphasizes long-term results and outcomes.
- By knowing the "big picture," staff can utilize resources in a way that can support the entire organization.
- Allows staff to judge whether he or she is performing well.

- Integrates performance assessment into jobs on a daily basis (lowering anxiety).
- Optimizes effectiveness, productivity, performances.
- Recognize and appreciate efforts and successes.

### **Why Measure Results?**

- What gets measured, gets done.
- If you don't measure results, you can't tell success from failure.
- If you can't see success, you can't reward it.
- If you can't reward success, you are probably rewarding failure.

### **Exemplary Performance Management Processes**

Include ...

- Performance planning
- Environments that foster high performance
- Regular performance reviews
- Performance development plans
- Integration of individual, team and departmental performance with organizational objectives and strategies

### **ADDENDUM NOTES**

- Learning is the foundation of achievement.
- Mini-reviews on a quarterly basis allow flexibility in performance planning.
- Adjust planning whenever changes in organization occur.
- Every action needs to be aligned to goals and aims of the organization.

### **Performance Appraisals**

The process of evaluating an individual's performance after a specific period of time or completion of a specific task cycle or set of duties

### **Performance Appraisal Errors**

What kinds of errors are commonly made during the performance appraisal process?

- Subjective performance measures

- Leniency errors
- Severity errors
- Halo errors
- Central tendency errors

## ADDENDUM NOTES

- Subjective Performance Measures: need to measure subjectively, because each job is different and entails different levels of skills.
- Leniency errors: tendency to perceive the job performance of ratees as especially good.
- Severity errors: tendency to perceive the job performance of ratees as especially ineffective.
- Halo errors: use a rating assigned to one job dimension to rate several other dimensions.

### Performance Assessment Tools

- **Rating Scales:** a subjective evaluation on a number of job-related dimensions on a scale of low to high
- **Checklists:** a selection of statements and adjectives describing employee's job-related performance and behaviour
- **Critical Incident:** requires the rater to record statements that describe employee behaviour related to job performance
- **Behaviourally Anchored Rating Scales:** an attempt to reduce subjectivity and biases by focusing on specific and critical work behaviours rather than on traits and personality characteristics
- **Field Review:** a skilled representative of the performance management department goes to the actual job situation and assists with the ratings
- **Self-appraisal:** requires the individual to evaluate one's own past and present performance and knowledge
- **Management by Objectives:** goal-directed approach whereby employee and manager jointly establish and assess performance goals

## ADDENDUM

- Critical Incident: requires recording of all behaviours – a flaw may be not being able to capture all traits and behaviours.

## Principles of Evaluation

- **Fair & Reasonable**
  - No surprises
  - Objectivity: Evidence
  - Tied to articulated goals and expectations
  - No single-person opinions
- **Process**
  - Not an event
  - Clearly articulated
  - Involving the right people
  - On a mutually understood basis
- **Time and Timing**
  - Sufficient, scheduled lead time
  - Sufficient, scheduled time to accomplish the process
  - Scheduling at appropriate times

## The Performance Appraisal Process

- The employee should complete his/her own performance appraisal, and you as the manager completes one for the employee (another approach is to work together and complete the performance appraisal)
- Set up a time with the employee to review his/her performance
- Ensure that you create a comfortable environment for the process
- Give the employee a chance to articulate how he/she sees his/her own performance
- Articulate how you see his/her performance and go through the evaluation process
- Set goals and date for the next review period

## Performance Development Plans

- Ask employees to articulate their career goals and interests
- Offer employees opportunities in order to help them achieve their personal goals
- How can employees go about developing their knowledge, skills and abilities?
- What traditional and non-traditional opportunities exist?

### **A Final Thought!**

Performance management is an ongoing process whereby you and your employee together establish and prioritize goals that will help your employee and organization grow and develop!

## **B6 – Developing a Compensation Strategy – led by Mike O'Meara**

A workshop to explore the rationale behind a fair compensation strategy.

### **Questions/Issues addressed by the session leader:**

- What participants are willing to learn from the workshop.
- How to deal with staff management and pay raise.
- Compensation package for small organizations.
- Compensation in the arts sector and challenges.
- How to tie compensation with performance evaluation.
- Developing salary ranges.
- Professionalize the community to articulate the proper compensation for staff.
- Salary ranges and compensation(benefit packages) for staff on contract and volunteers.

### **What types of compensation do people currently receive?**

- Salary.
- Health and dental plans.
- Vacation time.
- Professional development.
- CPP.
- RSP.
- Contract agreement.
- Financial incentives.
- Complimentary tickets.
- Staff discounts.
- Flex time.
- Life-style account.

### **Starting Place**

To design a compensation package you should first go back to organizational culture and attitudes and values.

Session leader presentation is in borders, recorder notes are noted as addendum:

### **Compensation Management**

The 1st and most important step is  
"Developing a Compensation Strategy"

### **Compensation Strategies Your Own Experiences**

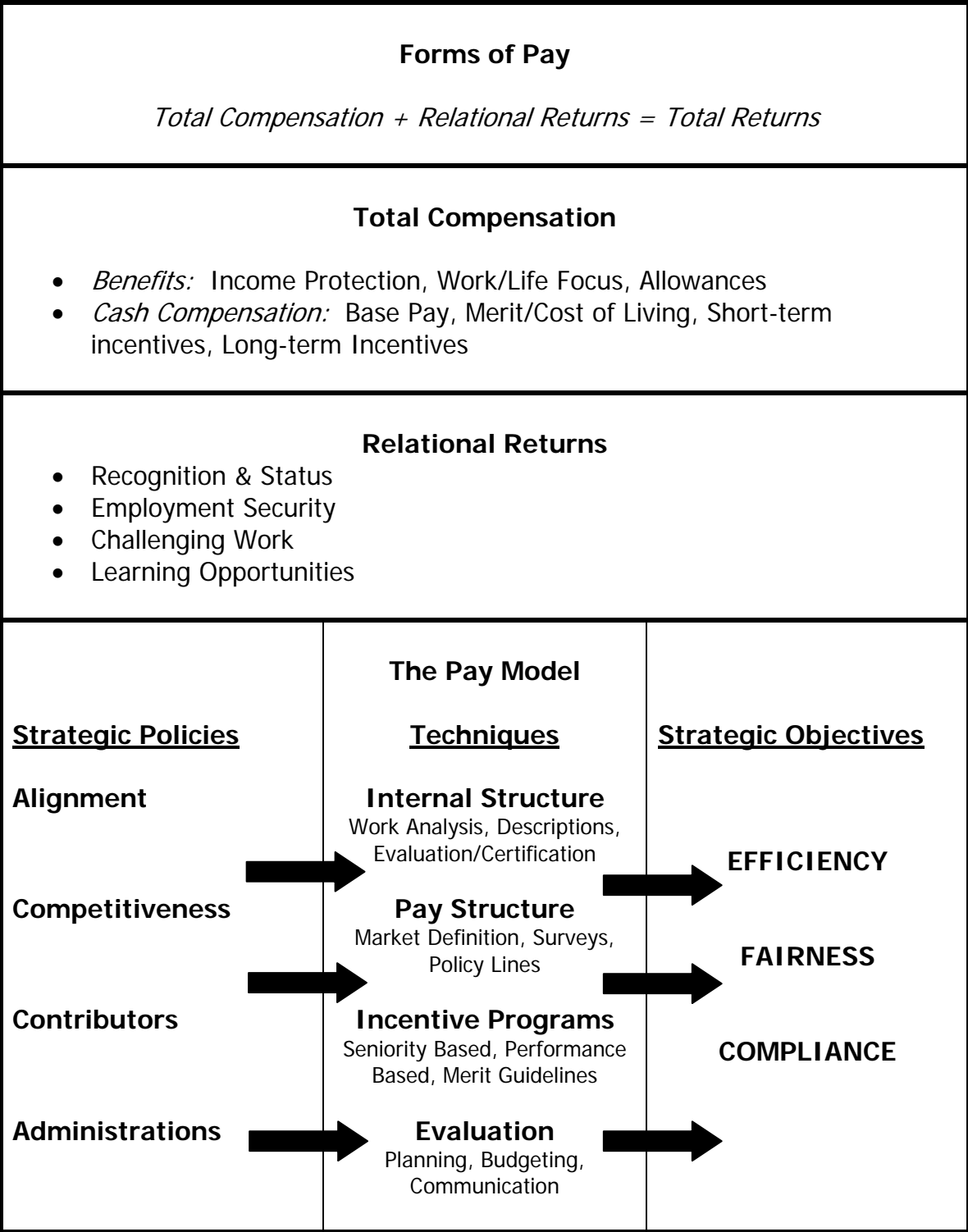
- *Think about the organization that you work for (or an organization that you have worked for in the past. What types of compensation + rewards are offered by the organization?*
- *Is the base pay the same for employees in the same job category? If different, why?*
- *Is the total pay the same for employees in the same job category? If different, why?*
- *Why are the rewards important for you? For the organization?*

### **Compensation**

Refers to all forms of financial returns and tangible services and benefits employees receive as part of an employment relationship

### **Objectives of an effective compensation strategy**

- To attract individuals with the knowledge, ability and talents demanded by specific organizational needs
- To retain valued and productive employees
- To promote specific job behaviours conducive to higher levels of job performance
- To promote attitudes conducive to loyalty and commitment to the organization, high job involvement and job satisfaction
- To stimulate employee growth that enables the employee to accept more challenging positions
- To comply with the requirements of pay equity and related laws



## The Pay Model

- *Strategic Policies* – It's critical that all policy decisions reflect the organization's values and culture
- *Strategic Objectives* – Objectives guide the design of the system + set standards for evaluating effectiveness of the system.
- *Pay Techniques* – It's equally critical to ensure organizational values and culture are taken into consideration and implemented in a consistent manner.

## Things to Consider

- *Internal Alignment* – comparisons among jobs or skill levels inside a single organization
- *External Competitiveness* – relative to the competition: how much and what form?
- *Contributors* – relative emphasis on performance (relates to attitudes and work behaviours)
- *Administration* – in order to achieve its objectives, the pay model must be managed properly
- *Efficiency* – performance, quality, customers and stockholders, controlling labour costs
- *Fairness* – fair treatment for all employees by recognizing employee contributions and employee needs (procedural fairness relates to the processes used to make decisions about pay)
- *Compliance* – conforming to federal and provincial laws and regulations

## ADDENDUM NOTES

- Internal alignment: ensure you are paying for the skill level – not for the individual in the job.
- Contributors: the reaction to various situations is key.
- Administration: surveys, opinion polls are useful tools
- Judgement is made on perceptions of reality not of reality itself.
- Procedures for compensation should be documented.
- For clear compliance, know your strategies well.

## Pay Techniques

- **Internal Alignment** – work analysis, job descriptions, evaluations and certifications
- **Pay Structure** – market definitions, surveys and policies
- **Incentive Programs** – seniority, performance, merit guidelines
- **Evaluation** – planning, budgeting, communications

## ADDENDUM NOTES

### Internal Alignment

- Keep job descriptions up to date.
- Carry out regular and documented performance reviews, agreeable to both parties.

### Incentive Programs

- Develop a focus group.
- Merit guidelines based on improving efficiency.

## Strategic Perspectives

Corporate Objectives, Strategic Plans, Vision and Values

*What business should we be in?*



Business Unit Strategies

*How do we gain and sustain competitive advantage?*



HR Strategies



Strategic Compensation Decisions

*How should total compensation help gain and sustain competitive advantage?*

## Factors Impacting Compensation Strategies

- External Sources:
  - *Economic Conditions*
  - *Technological Changes*

- *Government Regulations*
- *Union Expectations*
- *Sociocultural Climate*
- Internal Sources
  - *Internal Work Culture*
  - *Business Strategies*
  - *Product Life Cycle*

## ADDENDUM NOTES

### Internal Sources

- Internal Work Culture: know the diversity of your workforce.
- Business Strategies: realize the value of your employees.
- Product Life Cycle: design your compensation package according to your product cycle.

### Managerial Strategies and Compensation Systems

- *Classical Approach*: people are inherently lazy and dislike work, people will only work by creating circumstances under which their needs will be threatened
- *Human Relations Approach*: agree that people dislike work; however, believe people can be motivated by appealing to their social needs, recognize the role of peer group influence, treated fairly, positive employee norms will develop
- *High-Involvement Approach*: if jobs are structured correctly, people will enjoy their work and be motivated intrinsically by it

### Questions and Thoughts

- Applicability to small organizations:
  - a. Expand responsibilities.
  - b. Offer diversity in tasks.
  - c. Cross-training.
  - d. Involve employees in decision-making process.
  - e. Ensure employees are stimulated.
- Constant feedback from employees is necessary in developing compensation strategies.
- Relational Returns:
  - a. More tangible.

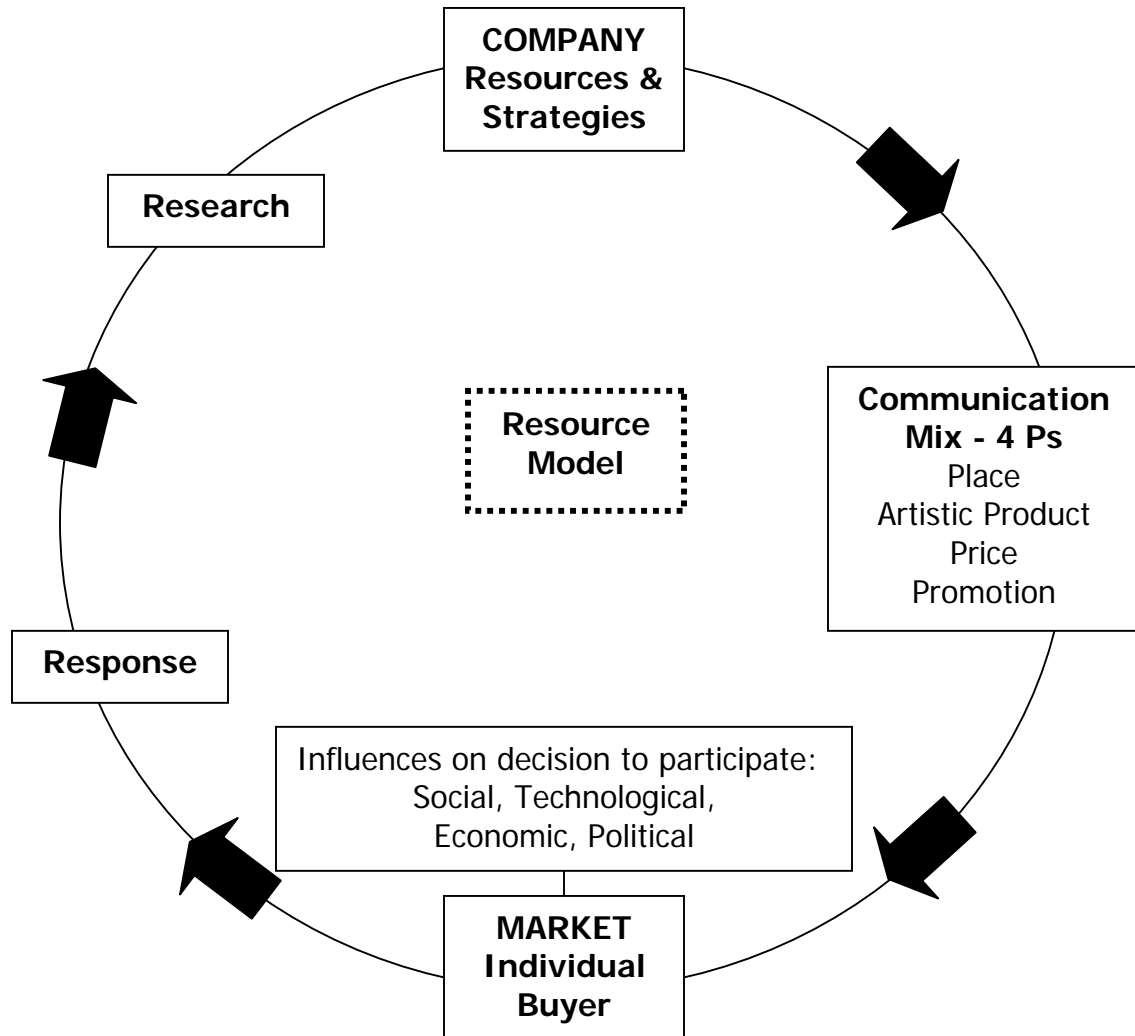
- b. Employee empowerment – by involving them in organizational strategies.
  - c. Challenging work.
- For organizations with employees in different geographical regions: compensation differences must be legitimately reasoned by open communication with all those affected.
- The budget controls pay strategy, possibly resulting in
  - a. Guilt.
  - b. Helplessness.
  - c. Reactive shift in strategy.
- General “Compensation Policies” should replace “Raise Policies” because sometime you can’t meet raise policies.
- Involving staff in developing their own compensation package involves them in organizational health.

## **B7 – Organizational Self-Evaluation – Aboriginal and Culturally Diverse Arts Practices – led by Jane Marsland and Shadi Mogadime**

A workshop to explore organizational self-evaluation with people involved with Aboriginal and culturally diverse arts practices.

Three self-assessment models were offered with the qualification that they are just models; any form of self-assessment requires reflection to ensure it works for the individual organization. Participants were encouraged to use elements from their own unique cultures, visions and art forms to shape their self-assessment. The three models are Resource Model, Template for Knowledge-based Assessment, and an Organizational Self-Assessment Checklist.

## 1 – Resource Model



The Resource Model, presented by Shadi Mogadime, is designed to be a practical aid in developing strategies. For this model to be effective, an organization must have both a clear sense of its goals and a realistic understanding of its current situation. This model allows an organization to see its resources and goals in relation to its external environment and factors.

Jane Marsland presented a self-assessment tool that she and other mid-sized performing arts managers developed. In order to successfully carry out an organizational self-assessment, a clear definition of values and purpose are critical. Self-assessment is an internal, subjective, and overarching process that is knowledge-based, whereas an evaluation can be either internal or external and is done at certain points in time or on a body of work to determine specific value. Successful self-assessment allows for organizations to be complex and adaptive.

This model can be implemented by means of interviews with staff and stakeholders. Each indicator is rated on a scale of 1 to 100 by the participants. Results can be plotted into the scale provided (Evaluative Baseline) to indicate patterns.

## **2 – Template for Knowledge-based Assessment**

The *Creative Trust for the Arts* is designed to help arts organizations become healthy, balanced, productive, confident and self-reliant. We believe that organizations will be able to take full advantage of the Creative Trust Working Capital Awards if they have the artistic and operating wherewithal to maintain and replenish key resources of support for the artists, organizational processes and artistic works.

In assessing organizations for the *Creative Trust for the Arts*, and indeed in the Healthy Balanced Organization working process itself, we will focus on a number of key characteristics, internal operating capacities and behaviours that, taken together, provide the healthiest and most balanced working framework for an arts organization. We believe that these characteristics, capacities and behaviours are essential for maintaining and sustaining a healthy, balanced and productive arts organization over time. A critical component of this process is the prerequisite for the professional leadership to apply their knowledge of their organization to be able to position themselves accurately with regard to each element. Organizations will be considered “ready” for working capital awards based on how well each has addressed the elements of an organizational template.

### **I – LEADERSHIP, VISION AND RELATIONSHIPS**

#### **Leadership**

##### **A Professional leadership – Artistic Director and General Manager**

- A1** Professional leadership is in place, leading and directing the organization.
- A2** The professional leadership is acknowledged and supported by staff and Board.
- A3** The Artistic Director and General Manager have a shared understanding of the vision, purpose, values, and beliefs of the organization.

##### **B Board Leadership**

- B1** Appropriate Board leadership is in place, leading and directing the Board in appropriate ways.

- B2** Board members understand and support the artistic vision and mission of the organization.
- B3** Board members understand the role of the Board as well as their individual roles on the Board.
- B4** The Board been well cast and functions in appropriate and effective ways.
- B5** Board members have made a commitment to the organization by articulating what they will do to assist the organization achieve its mission and what they will give as a personal donation.

**C Vision/Values/Mission**

- C1** There is a clear articulation of vision, values and mission of the work and the organization.
- C2** The Artistic Director is able to articulate clearly why the organization should exist and what makes it unique.
- C3** The Artistic Director is able to clearly describe the philosophic and aesthetic values that underlie the artistic choices for the creation, production and/or presentation of artistic works.
- C4** This information is clearly communicated internally and externally.

**Relationships**

There is a commitment to developing and maintaining quality relationships, both internally among the organization's professional staff and Board and externally with community partners and audiences.

**D Internal Relationships**

- D1** There is a shared sense of purpose among professional staff along with a clear understanding of the values and beliefs that inform how everyone works together.
- D2** The organization has a distinct working culture that is shared by the artistic, administrative and Board centres.
- D3** The Artistic Director and General Manager have an excellent working relationship.

**E External Relationships**

- E1** There is a commitment to developing and maintaining quality relationships with other arts organizations and key partner organizations in the community.
- E2** There is a commitment to developing and maintaining quality relationships with the audience and donors and patrons of the organization.
- E3** The Board of Directors is well cast from the community and develops and maintains supportive relationships with key community members.

## **II – WORKING FORMAT, THE ORGANIZATIONAL EQUATION AND INFRASTRUCTURE**

### **F Working Format**

- F1** The working format—whether it is project based or operational—reflects the defined and understood processes of collaborating, planning, analyzing needs and problems, strategizing, problem solving, decision making and taking action.
- F2** The format is informed by and consistent with the professional leadership’s artistic, programming and/or curatorial processes.

### **G The Organizational Equation/Balance**

- G1** There is a clear understanding of the organizational equation and the critical balance between programs and activities and available human, financial, time, material and technical resources.
- G2** There is a clear and coherent understanding of the condition of the equation at any given time.

### **H Infrastructure**

- H1** Organizational structures and systems are appropriate and adequate to the work in place and working effectively.
- H2** Appropriate management, financial and information systems are in place.
- H3** Appropriate and adequate strategic support systems for earned and contributed income programs are in place.
- H4** There are appropriate human resources with necessary attributes and skill sets to maintain a healthy organizational operation and balance.

## **III – EFFECTIVE PLANNING AND LEARNING PROCESSES**

### **I Working Processes**

- I1** There are clearly described, defined and understood processes for collaborating, analyzing needs and problems, strategizing, solving problems, making decisions and taking action.
- I2** The working processes are informed by and consistent with the professional leadership’s artistic, programming and/or curatorial processes.

### **J Planning and Learning**

- J1** A planning process is in place that addresses short-, medium- and long-term planning concerns and issues.
- J2** This process is an effective learning tool that helps the organization adapt to or effect change within its working conditions or environment.
- J3** The process defines the quantitative and qualitative indicators that allow the organization to evaluate its progress and learning.

#### **IV – RESOURCE DEVELOPMENT: RELATIONSHIP TO AUDIENCES AND CONTRIBUTED INCOME**

##### **K Relationship to Audience – Earned Income**

- K1** There is clarity with regard to whom the organization wants to connect and why.
- K2** There is the same commitment to quality relationships internally extended to relationships with the audience.
- K3** A commitment and process are in place to build and maintain audience relationships for both the short and long term.
- K4** There are clear and coherent concepts, plans and approaches for generating and growing earned income that are appropriate to the work, community environment, organizational values and internal capacities.

##### **L Contributed Income**

- L1** There are clear and coherent concepts, plans and approaches for generating and growing contributed income that are appropriate to the work, community environment, organizational values and internal capacities.

**Sample Self-Assessment Rating:**

NAME OF ORGANIZATION \_\_\_\_\_

EVALUATION BASELINE AS AT: \_\_\_\_\_

Optimum effectiveness										Irreducible minimum					deficit		
																	L1
																	K4
																	K3
																	K2
																	K1
																	J3
																	J2
																	J1
																	I2
																	I1
																	H4
																	H3
																	H2
																	H1
																	G2
																	G1
																	F2
																	F1
																	E3
																	E2
																	E1
																	D3
																	D2
																	D1
																	C4
																	C3
																	C2
																	C1
																	B5
																	B4
																	B3
																	B2
																	B1
																	A3
																	A2
																	A1
100%	95%	90%	85%	80%	75%	70%	65%	60%	58%	56%	54%	52%	50%				

**SCORES**

Professional Leadership	A1	80	75
	A2	90	90
	A3	90	90
Board Leadership	B1	55	55
	B2	55	50
	B3	49	49
	B4	49	49
	B5	49	49
Vision/Mission/Values	C1	75	75
	C2	90	90
	C3	90	90
	C4	85	85
Internal Relationships	D1	90	90
	D2	60	60
	D3	90	90
External Relationships	E1	80	85
	E2	85	85
	E3	55	55
Working Format	F1	90	90
	F2	90	90
Organizational Equation	G1	85	85
	G2	90	90
Infrastructure	H1	70	70
	H2	85	85
	H3	65	65
	H4	85	85
Working Processes	I1	55	55
	I2	65	65
Planning and Learning	J1	75	75
	J2	70	70
	J3	65	65
Relationship to Audience	K1	95	95
Earned Income	K2	80	80
	K3	65	65
	K4	60	60
Contributed Income	L1	49	49

### 3 – Organizational Self-Assessment Checklist

<http://www.nea.gov/resources/Lessons/WARSHAWSKI.HTML>  
by [Morrie Warshawski, Editor](#)

<b>ORGANIZATIONAL SELF-ASSESSMENT CHECKLIST</b>	Strong	Ade-quate	Weak	N/A
<b>ORGANIZATIONAL PURPOSE</b>				
1. Concise, written Mission Statement				
2. Concise, written Artistic Philosophy Statement				
3. Understanding of mission and philosophy by Board				
4. Understanding of mission and philosophy by staff				
5. Understanding of mission and philosophy by constituencies/general public				
6. Understanding of mission and philosophy by prospective funders				
7. Mission statement and philosophy reviewed regularly				
8. Concise, written history of the organization				
<b>PROGRAMS</b>				
1. Sense of vision and continuity provided by artistic leadership				
2. Annual program planning process				
3. Written annual program plan				
4. Formal communication of annual program plans to staff				
5. Formal communication of annual program plans to Board/volunteers				
6. Method for review/evaluation of prior year's program				
7. Method for determining whether programs meet constituent needs				
8. Written multiyear program plan				
9. Adequacy of rehearsal/preparation time/equipment				
10. System for costing out program elements				
11. Volunteer support of programs				
12. Other artistic issues				
<b>GOVERNANCE</b>				
1. Understanding of the responsibilities of the Board				
2. Written Board member job descriptions				
3. By-laws: current, functional, used				
4. Procedures for evaluating short-term/long-term objectives				
5. Procedures for recruiting new Board members				

6. Procedures for orientation of new Board members				
7. Procedure for evaluating Board members and/or Board rotation				
8. Structure of Board committees				
9. Frequency of Board meetings				
10. Attendance at Board meetings				
11. Procedure for meeting notice and preparation				
12. Effective use of time at Board meetings				
13. Board attendance at performances/exhibits				
14. Staff input into Board decision making				
15. Understandable financial reports presented to Board				
16. Board's understanding of finances				
17. Method of reviewing auditor's report				
18. Board represents community served				
19. Board's understanding of Board/staff relationships				
20. Board's understanding of fundraising				
21. Board members make sufficient cash donations annually				
22. Board members give time/expertise				
23. Board members advocate the organization in the community				
24. Board members review/approve long-range plan				
25. Board members' recruitment of new audience members				
26. Board members' recruitment of new donors				
27. Board members' sense of involvement				
28. Board members' sense of accomplishment				
29. Role of advisory committees				
30. Other governance issues				
<b>STAFF</b>				
1. Clarity of reporting relationships				
2. Current and accurate written job descriptions				
3. Administrative leadership				
4. Communication among staff members				
5. Communication between staff and Board				
6. Communication among staff, Board and artists				
7. Staff's understanding of the function and duties of the Board				
8. Staff participation in planning				
9. Appropriateness of staff size re: programming challenge				
10. Staff experience in relationship to the job assignment				

11. Time available to perform jobs satisfactorily				
12. Opportunities for staff training and personal development				
13. Systems for recruiting/using/thanking staff & and volunteers				
14. Written personnel manual and policies				
15. System for annual performance reviews				
16. Benefit package for staff				
17. Benefit package for artists				
18. Salary scale for staff				
19. Pay scale for artists				
20. Employment status of artists (employee or independent contractor)				
21. Staff use of consultants/contractors				
22. Staff morale				
23. Office equipment				
24. Other personnel issues				
<b>MARKETING</b>				
1. Understanding of who currently patronizes organization (e.g., ticket sales, book sales, memberships, etc.)				
2. Understanding of whom organization wants as patrons (target markets)				
3. Understanding of competition and annual review of their activities				
4. Tracking of actual ticket sales/attendance by event and fiscal year				
5. Mechanism for regular market research and analysis				
6. Annual written: marketing plan, subscription promotion plan, single ticket/membership promotion plan, other sales promotion plan				
7. Organization's subscription renewal rate (repeat customers)				
8. Effective marketing/promotional materials				
9. Marketing budget				
10. Analysis of cost-per-unit to sell each product				
11. Size of marketing staff in relation to task				
12. Experience of marketing staff in relation to task				
13. Staff use of marketing consultants				
14. Volunteer assistance with marketing/subscription/sales				
15. Ability of organization to accurately project earned income goals				
16. Ability of organization to consistently meet earned income goals				

17. Process for evaluating effectiveness of marketing plan				
18. In-house mailing list: computerized procedures for updating/purging information				
19. Other marketing issues				
<b>PUBLIC/COMMUNITY RELATIONS</b>				
1. Consistency and clarity of organizational image communicated to public				
2. Mechanism for handling of public queries, complaints, etc.				
3. Annual public relations plan				
4. Effectiveness in representing the organization: to its constituencies; to the general public; to the press; to critics				
5. Mechanisms for receiving and evaluating feedback from various sources				
6. Organization's publications				
7. Size of staff in relation to task				
8. Experience of staff in relation to job assignment				
9. Budget for public relations				
10. Understanding of difference between marketing and public relations				
11. Other public/community relations issues				
<b>FUNDRAISING</b>				
1. Process for setting annual fundraising goals				
2. Mechanism for providing development staff input into fundraising goals				
3. Mechanism for providing Board input into fundraising goals				
4. Ability of organization to consistently meet fundraising goals				
5. Written development plan for annual operating support				
6. Plan indicates secured, renewable and speculative contributed income				
7. Size of development staff in relation to task				
8. Experience of staff in relation to job assignment				
9. Grant writing expertise				
10. Individual donor research capacity				
11. Corporate, foundation, govt. grants research capacity				
12. Special events consistently net at least 50% of income as profit				
13. Impact on organization of producing special events				
14. Leadership of Board in special events				
15. Involvement of Board in prospect identification				
16. Involvement of Board in individual donor solicitation				
17. Non-Board volunteer support of fundraising effort				

18. Solicitor training				
19. Earned income/contributed income mix				
20. Organization's ability to attract individual donations; gifts; corporate and corporate foundation gifts; private foundation funding				
21. Level of local government grants (arts and non-arts)				
22. Level of provincial/state government funding				
23. Level of national government funding				
24. Development materials				
25. Computer support for fundraising				
26. Gift recording system				
27. Gift acknowledgement system				
28. Systematized information about donors/prospects				
29. Mechanism for systematic renewal of past/lapsed donors				
30. Systematic plan for expanding donor base				
31. Budget for fundraising expenses				
32. Other fundraising issues				
<b>FINANCIAL MANAGEMENT</b>				
1. Annual budgeting process				
2. Computerized accounting/budgeting/reporting systems				
3. Board mechanism for reviewing monthly statements				
4. System for regular cash-flow projections and monitoring				
5. Ability of organization to manage cash flow				
6. Formalized cost controls				
7. Ability of organization to pay accounts payable within 30 days				
8. Annual financial audit (with management letter) by CPA				
9. Board system for reviewing audit				
10. System of internal controls				
11. Payroll tax deposits made when due				
12. Ability of organization to manage debt repayment of notes/loans outstanding				
13. Line of credit for the organization				
14. Investment and endowment returns				
15. Formal policy that maintains integrity of cash reserve or endowment				
16. System for segregating pre-payments in restricted accounts				
17. Size of staff in relation to tasks				
18. Experience of staff in relation to job assignments				
19. Staff's understanding of financial systems				

20. Other financial management issues				
<b>FACILITIES</b>				
1. Space for productions/exhibits/activities at present level				
2. Space for expanded productions/exhibits/activities				
3. Space for current administrative staff				
4. Space for expanded administrative staff				
5. Space for current production staff				
6. Space for expanded production staff				
7. Storage facilities				
8. Image facility communicates to constituents				
9. Ambience of space for staff and volunteers				
10. Degree of organization's control of facility				
11. Length of lease agreement				
12. Other facilities issues				
<b>PLANNING</b>				
1. Multi-year plan in place and in use				
2. Plan reviewed and updated annually with Board and staff				
3. Evaluation of previous year's activities in relation to plan				
4. Other planning issues				
<b>COMMUNICATION/DECISION MAKING</b>				
1. Communication within the organization is open, candid, timely				
2. Decision-making process is well-informed, timely				
3. Other communication/decision-making issues				
<b>EXTERNAL ENVIRONMENT</b>				
1. Understanding of local/regional economic climate; giving to the arts; attendance of the arts				
2. Organization's knowledge of/relationship to arts community				
3. Organization's knowledge of/relationship to non-arts community				

The session participants were asked to work in groups to discuss how their values, culture and vision might influence them to develop a model of self-assessment.

**Group A – Values:**

- Reflect community you represent.
- Listening and acting as a conduit.
- Communication.
- Respect for culture, cultural beliefs and history.
- Easy relationship with laughter.
- Active listening.

**Group B:**

- Ensuring reaching target group.
- Reflected in staff, volunteers etc.
- Amateur to professional.
- How to move along continuum.
- What is holding organization back?
- Board – decision-making process – consensus.

**Group C – What else to do:**

- Vision for seven generations.
- Intergeneration/inclusive.
- Preservation of history.
  - a. Where it came from
  - b. Continuum
- Sense of community – here and where we came from.
- Storytelling.
- Mentorship – developing new ways and history of own culture continuing.

**Group D:**

- Models are a springboard for a bigger conversation.
- Artistic vision has to be at the centre.
- Analysis of evaluation is a snapshot in time.

## Subject Breakout Sessions – Monday, February 7, 2005

### C1 – The Value of Mentorship – led by Deborah Andrews

A Case Study of the Canadian Film and Television Production Association.



**CFTPA**

*Representing television, film  
and interactive production in Canada*

**ACPFT**

*Porte-parole de l'industrie de la production télévisuelle,  
cinématographique et interactive au Canada*

**Canadian Film and Television Production Association**

~

**Mentorship Program**

#### **CFTPA:**

- Represents approximately 400 producers
- Diverse membership
- Members produce for television, film, and interactive media
- 26-member Board of Directors representing each region
- 3 offices – Ottawa, Toronto, Vancouver
- Works closely with APFTQ in Quebec

#### **CFTPA:**

- Role of the association:
  - Represents general interests of members provincially, federally and internationally
  - MENTORSHIP PROGRAM
  - Negotiates and manages labour agreements
  - Creates international marketing initiatives
  - Oversees copyright initiatives
  - Publications, conference and Web site

## Highlights

- ❑ Total production activity \$4.92 billion:
  - \$1.90 billion in **foreign location production**
  - \$1.72 billion in **CAVCO-certified production**
  - \$1.04 billion in **broadcaster in-house production**
  - \$258 million in **non-CAVCO certified production**
- ❑ 134 700 total full-time jobs

## Co-production Treaties

- Canada has treaties with 54 countries
- Treaties enable Canadian and foreign producers to co-produce projects that enjoy the status of national productions in both countries
- Requirements for co-production with Canada
  - Canadian co-producer
  - usually minimum 20% financial participation
  - proportionate investments/costs incurred in each country
  - balanced financial, technical, artistic contribution
  - Approval by authorities in both countries
- Treaties are administered by Telefilm Canada and the corresponding authority in the other country

## MENTORSHIP

- International Program
- National Program
- Aboriginal Program
- CTV Program
- Global Program
- Corus Entertainment Filmmaker Program
- Telefilm Producer Trainee Program
  
- Over 450 participants have been trained with a post-mentorship employment rate of over 80%

### **International Program**

- Funded through Foreign Affairs Canada and International Trade (FAC)
- Opportunities for young people to develop skills in international marketing and distribution, co-productions
- Over 85% of our intern graduates secure employment in the industry
- Requirements – 18-30 years of age
  - post-secondary education
  - first international career-related experience
- Most participants work out of the country for six months

### **National Program**

- Funded through HRSDC Youth Employment Strategy Career Focus Program
- Over 230 placements since the onset of the program
- Participants placed throughout Canada
- Requirements – 18-30
  - post-secondary education
  - unemployed or underemployed
- Intended to be the nexus between post-secondary education and career

### **Aboriginal Program**

- Development of specific mentorship program for First Nations Peoples
- APTN, National Aboriginal Achievement Foundation, and many Aboriginal organizations across the country
- Complicated funding formula, multi-funders for one participant
- One of the most rewarding programs
- No age parameters

### **CTV Program**

- Funded by CTV as part of their social benefits package
- Intended to be for projects that are cross-platform, new media in nature
- Generally a professional development program
- Places up to six in the country annually

### **Global Program**

- Funded by BC Global
- Funded as part of a social benefits package
- Five-year commitment from the private funder
- Places up to six participants annually in BC
- No age parameters

### **Corus Young Filmmakers Program**

- Funded by Corus Entertainment
- Five-year commitment
- Funds up to six short films a year
- Participants are guaranteed a national broadcast window
- Takes mentoring one step further than other programs

### **Training vs. Mentoring**

- What is training
- What is mentoring
- The difference?
- Matching
- Monitoring
- Evaluating
- Follow up
- Tracking

#### **Training**

- Can't move up, get boxed in – this program moves to middle level.
- No age parameter.
- Youth program is not transit supportive of cultural-sector lifestyle.

#### **Mentorship**

- Allows you to know if something has gone wrong.
- Passion of sharing knowledge; checks and balance to keep relationship strong.
- National mentorship strategy is formulized mentorship.
- Sympathetic role model, colleague – that impart their knowledge.
- Will deliver: complete deadline – mentor creates path so learner can get there.
- Reward – moving people forward.

### **Positions training and mentor**

- Who does funding go to? Most organizations are strapped. Where are we going to find sources in an already flat source base?
- 50 to 80% WAGE subsidy.
- Paid employment – T4 system.
- Training – 20 to 39 weeks and if can identify more can usually get money from EI Programs.
- Competitive for mentor and participant.
- Application on Web site for ideas.

### **Mentorship program**

- Entire placement is on-the-job training.
- Application should include outline of schedule, achievable goals of participant, future opportunities of participant, timed training, relationship, work styles of mentor.
- CFTPA checks in once a month, participant to e-mail once a week.
- Contractual agreement.
- Will assist with mentorship delivery if necessary – intervene with personality if necessary.

The following are comments from the Q&A session regarding the administration of a mentorship program:

- Look for sympathetic role models as your mentors.
- Consider personalities.
- Ask participants to do some research.
- Have participants identify areas that they would like to focus on then connect them to the right mentor.
- LISTENING is key.
- Meet with participants and mentors as much as possible.
- Know the mentor will take time to work with participant.
- Mentorship is all about relationship building.
- Seasoned veterans are often more interested in career-oriented candidates; not as interested in academic stream.
- Make sure there is a benefit to the mentor; always a need to find a way to compensate them; mentors will burn out.
- Monitor progress and ensure there are logical steps to mentorship.
- Give participants and mentors opportunity to make comments off the record.
- Bring mentors together regionally.

**Remember: not all internships are created equal.**

## **C2 – Surviving Transitions – led by Lisa Steele**

A working session to explore and suggest ways of building and sustaining healthy organizations that can adapt and survive transitions.

**Group Brainstorming session:** Identifying “transitions” in our organizations

### **Examples of small or minor events triggering transitions:**

- Turnover of junior staff.
- Ordinary turnover of Board members.
- Small (less than 10%) decrease in operations funding from regular source.
- Perceived change in audience.
- Incremental technological change.
- Small but unforeseen expenses.

### **Examples of major events triggering transitions:**

- Senior staff turnover.
- Board-in-revolt (a serious dispute between staff and Board; or a split within different factions of the Board).
- Volunteer committees in revolt or seriously out of sorts with management and/or Board.
- Significant (more than 10%) decrease in operations from regular source.
- Large unforeseen expense.
- Rapid growth.
- Expansion of artistic mandate.
- Expansion of venue.
- Relocation.

### **Examples of catastrophic events triggering transitions:**

- Significant government intervention (police investigation and/or charges) or direct intervention in the form of censorship of exhibition/activity, etc.
- Transformation of major funding sources.
- Serious theft or flood, fire, weather damage to the physical premises and/or collection.
- Split of the organization.
- Incurring deficit.

**Break-out groups:** Each group was asked to develop strategies to address these situations:

**Group A:** Your arts centre/organization has to replace a chief executive officer who leaves suddenly because of illness; one week’s notice.

### **Staff Perspective:**

- Suggest a three-month contract to the departing staff.

- Will the person be returning?
- Make special allowance for disabilities.
- Is there a succession plan?
- Is there a search committee developed by Board?
- Could a Board member take on a leadership role?
- Could the staff member come in one day a week and provide guidance and help with the transition?
- How is the additional work load divided up?
- Look at it as a positive opportunity.
- Redefine job descriptions (maybe they are outdated).
- Important to share information between Board and staff to ensure constant flow of information.

### **Board Perspective:**

- Sympathetic/fair approach.
- Negotiate the exit transition for the outgoing person.
- Look at four possible options:
  - a. Existing Board member
  - b. Existing staff member
  - c. Previous Board member
  - d. Previous staff member
- Identify immediate key tasks and deadlines.
- Create a critical path for the next year or six months with outgoing person or new CEO.
- Allocate decent amount of time for search process.
- Possibility of involving staff in search process.
- Hiring committee to include membership/stakeholders/volunteers familiar with the organization.
- Consider the details in light of the exiting staff.
- Public relations strategy to communicate to public.

### **Worst-case scenario:**

- Other staff quit.
- Lack of plan.
- Other Board members quit.
- No communication.
- Split (the Board doesn't think there is a possible candidate and staff thinks there is).

**Group B:** Your arts centre/organization faces a 25% decrease in operations funding from your main operations funding body as a result of government cutbacks.

**Staff & Board Perspectives** (Staff and Board decide that they should work together)

- Communication transparency.
- Internal committee with Board and staff to figure out what and why it happened.
- Internally go through consultation process.
- Share info and past experiences and knowledge.
- Identify other strategies.
- Reaching an agreement between Board and staff.
- Public relations – putting “best face forward”.
- How much deficit is the Board willing to incur?
- Honest look at what/how organization can survive on.
- What cost savings and efficiencies can be found?
- Look for alternative funding.
- Advocacy:
  - a. City councillors and funders.
  - b. Engage the public and encourage them to support you through advocacy on your behalf.
  - c. Bring in other affected organizations.
  - d. Partnership with other organizations.
  - e. Contact other membership organizations.
- Look at as an opportunity to raise public profile for positive change.
- Committee made of staff/Board/volunteers/community members/stakeholders to solve the problem.
- Revise strategic planning.
- Identify Board expectations from staff.
- Bringing two parts together.
- Identify long- and short-term cuts and their affect on the organization.
- Construct a time line.
- Get a consultant to analyze the situation.

**Group C:** Your arts centre/organization is visited by the local police and the possibility of being charged with violating “morality” or “obscenity” or “pornography” laws is suggested.

**Board & Staff Perspectives (Team)**

- Establish Board-approved procedure ahead of time for the front-line staff.
- Internal communication to front-line staff is essential.
- One spokesperson should be assigned ahead of time to speak to police or media (not from the front-line staff, preferably a more experienced staff member).
- Staff should be cautioned not to speak to police or media; only the spokesperson should do this.
- Inform the Board of the possibilities of controversies ahead of time.
- Emergency meeting of an organization to handle the situation (Board and staff).

- Post-crisis management:
  - a. Bring in a facilitator.
  - b. Avoid finger-pointing.
  - c. Establish an action plan that both feel comfortable with.
- Available resources to staff.
- Lower expectations on staff during crisis.
- Re-examine organization's mandate in a positive manner.
- Strengthen the mandate (facilitator can help the process).
- Make sure Board and staff are behind the mandate and that they are comfortable.
- Two-year commitment.
- Have someone with legal expertise on the Board.
- Ensure physical safety of staff and facility.

**Group D:** The Board of Directors of your arts centre/organization is in serious conflict with the staff, threatening to redefine all positions and make everybody re-apply for their jobs.

**Board & Staff Perspectives (Team)**

- Prevention is key.
- Shared vision.
- Strategic plan and Board manual are essential.
- Use a mediator to facilitate discussions.
- Communications strategy for media/public and to answer questions.
- Communicate the problem.
- Cooperation.
- Establish trust between Board and staff.
- Define roles and responsibilities of Board.
- Discuss Board rotation.
- Acknowledge emotional impact on staff.
- Staff investigate the legal issues.
- Reach an ultimate resolution.

### C3 – Occupational Health and Safety – led by Janet Sellery

A workshop to explore the benefits of implementing an OH&S policy.

#### Ontario’s health and safety system

ENFORCEMENT	PREVENTION
Ministry of Labour <ul style="list-style-type: none"> <li>- orders</li> <li>- tickets</li> <li>- charges</li> <li>- fines</li> <li>- jail time</li> </ul>	WSIB – Prevention <ul style="list-style-type: none"> <li>- Account Manager, Customer Service Rep</li> <li>- Prevention Division</li> </ul>
WSIB – Workwell Audit <ul style="list-style-type: none"> <li>- fines</li> <li>- surcharges</li> </ul>	Safe Work Associations <ul style="list-style-type: none"> <li>- Ontario Service Safety Alliance (OSSA)</li> <li>- Education Safety Association of Ontario (ESAO)</li> <li>- Construction Safety Association of Ontario (CSAO)</li> <li>- Industrial Accident Prevention Association (IAPA)</li> <li>- Occupational Health Clinics for Ontario Workers (OHCOW)</li> <li>- Canadian Centre for Occupational Health &amp; Safety (CCOHC)</li> </ul>

#### Challenges – These affect *every* hazard in the arts:

- Diversity of staff.
- Each project is unique.
- Atmosphere of continuous creativity and change.
- Creative risks vs. safety risk – “The show must go on.”
- Situations where many variables change at once.
- Time pressure – hard deadlines.
- Limited control of workload and schedule leads to fatigue and stress.
- Wide variety of training and experience.
- Highly mobile, seasonal workforce.
- Young worker/ aging worker issues.
- Health and safety will destroy art: “We’re special, we’re different, we’re not a factory.”

#### First Steps for Developing a Health & Safety Policy and Program

- What have you got?
- What do you need?
- Where do you start?
- Criteria:
  - i. Urgent – controls for serious and immediate hazards
  - ii. Easy – top five
    1. Health & Safety Policy.
    2. Health & Safety Notice Board.
    3. First Aid Kits and Training.

4. WHMIS (Workplace Hazardous Materials Information System).
5. Joint Health & Safety Committee or Health & Safety Representative.

**Approach:** Respect, Respond, Require.

### **PUBLICATIONS**

- **The Health & Safety Guide for Film, TV & Theater** by Monona Rossol, Allworth Press, New York, 2000.
- **The Artist's Complete Health and Safety Guide** by Monona Rossol, Allworth Press, New York, 2nd edition, 1994.
- **Construction Health & Safety Manual**, Construction Safety Association of Ontario, 2004 Edition. An excellent technical training tool in health and safety – legal responsibilities, WHMIS, basic occupational health, equipment, hazards, and best practices for a variety of tools. Recommended for all theatre shops.

### **INTERNET RESOURCES**

- **Arts, Crafts and Theater Safety (ACTS)** [www.artsandcraftstheatersafety.org](http://www.artsandcraftstheatersafety.org). Based in New York State, this organization provides free theatre health and safety brochures, pamphlets, and advice. They also have a newsletter, and the organization's president is arts-safety expert Monona Rossol.
- **Canadian Actors' Equity Association (CAEA)** [www.caea.com](http://www.caea.com). The stage management section of this Web site includes a General Health and Safety Checklist for use by stage managers and a link to Safety Guidelines for the Live Performance Industry in Ontario published by the Ontario Ministry of Labour in 1997.
- **Canadian Institute for Theatre Technology (CITT)** [www.citt.org](http://www.citt.org). CITT publishes "Theatre Safety Basics", a guide to creating a safety program for your company. CITT's Web site offers an online archive of their publication "StageWorks," which offers up-to-date news on health and safety issues and commentary. There is also contact information online for regional representatives who plan and oversee regional workshops.
- **Safety Guidelines for the Live Performance Industry in Ontario** <http://www.gov.on.ca/LAB/english/hs/guidelines/liveperformance>.
- **"To Act in Safety" a Theatre Ontario initiative**, [www.theatresafety.ca](http://www.theatresafety.ca). Best practices and resources for theatres.
- **Film and Television Health & Safety Committee** [www.filmsafety.ca](http://www.filmsafety.ca). Health and safety guidelines for film and television.
- **SHAPE (Safety & Health in Arts, Production & Entertainment)**, British Columbia, Workers Compensation [www.shape.bc.ca](http://www.shape.bc.ca).
- **Prevention Dynamics** [www.preventiondynamics.com](http://www.preventiondynamics.com). A health and safety portal to find information, training materials and consulting services offered by Ontario's health and safety associations and partners.

- **Ontario Ministry of Labour (MoL)** [http://www.gov.on.ca/LAB/english/about/leg/hs\\_leg.html](http://www.gov.on.ca/LAB/english/about/leg/hs_leg.html). Legislation ([Occupational Health and Safety Act](#), [Workplace Safety and Insurance Act, 1997](#) and [Regulations](#)) as well as guides to health and safety legislation ([A Guide to the Occupational Health and Safety Act](#), [A Guide for Joint Health and Safety Committees and Representatives in the Workplace](#), [Workplace Hazardous Materials Information System \(WHMIS\): A Guide to the Legislation](#)).
- **NOTE:** For a complete reference to the regulations made under the Occupational Health and Safety Act, please see the Annual Consolidated Index to the Regulations of Ontario: [Titles of Regulations on e-Laws \(www.e-laws.gov.on.ca\)](http://www.e-laws.gov.on.ca).
- **Ontario Service Safety Alliance (OSSA)** [www.ossa.com](http://www.ossa.com). Safe work association for services industries, including entertainment (live performance, film and TV).
- **Education Safety Association of Ontario (ESAO)** [www.esao.on.ca](http://www.esao.on.ca). Safe work association for art centres, museums, schools, colleges, universities and libraries.
- **Workplace Safety & Insurance Board (WSIB)** [www.wsib.on.ca](http://www.wsib.on.ca). Prevention and no-fault workplace insurance, financed by employer premiums.
- **Occupational Health Clinics for Ontario Workers (OHCOW)** [www.ohcow.on.ca](http://www.ohcow.on.ca). Primary focus: ergonomics, industrial hygiene, occupational disease.
- **Canadian Centre for Occupational Health & Safety** [www.ccohs.ca](http://www.ccohs.ca). Information sheets under OSH Answers as well as an Inquiry Service.

The following are excerpts from Janet's conversation with session participants:

- "I wish that a session like this had been available when I was starting out. I found the task of starting our health and safety program overwhelming initially."
- "The creative process presents many health and safety challenges; however, there are also opportunities for customized solutions because we can't always open a supplier's catalogue to find an instant answer."

### **Why should you get involved with health and safety?**

- "You are all busy and resources are stretched, so why would you take this on? It could be because you need to comply with legislation – you are concerned about Ministry of Labour orders, charges, fines and jail time, and now, under Bill C-45, the possibility of criminal charges. You may also be concerned about costs from fines, lawsuits, worker's compensation or Workwell."
- "In my opinion, the most compelling reason for the arts community to focus on health and safety is because we have something very special to protect."

- “When I began to create our program, initially, I met with some resistance. Some people said that all of this health and safety would destroy art. ‘We’re special, we’re different, we’re not a factory.’ I agree, we are not a factory but it is not acceptable to me that our artists, our craftspeople and our support staff should be any less protected than a factory worker.”
- “You are the experts in your discipline....you know best if something will work. If not, use your creativity to find a better way. The arts community requires creativity in all its activities.... Health and safety is no different. Find resources, support and encouragement wherever you can.”
- “When you contact a prevention organization, they cannot report you to an enforcement organization. These are separate approaches, so don’t let the lack of a formalized program stop you from getting the assistance you need.”
- “Once you know what policies you have in place, you need to figure out what legislation applies to you, this might include The Occupational Health & Safety Act, the Workplace Safety & Insurance Act, the Industrial Regulations, the Construction Regulations, the WHMIS Regulations, the First Aid Regulation and the Safety Guidelines for Live Performance. All provincial legislation is available online.”
- “It is important to know that the law requires all employers to exercise due diligence. This means ‘take every precaution reasonable in the circumstances for the protection of the worker.’ That’s a pretty high standard. In order to take precautions, you need to know what hazards exist.”
- “You might want to consider arranging for a consultant from a safe-work association to assist you with your assessment.”
- “Regardless of the size of your company, you will need some written policies and procedures. Most important is your Health & Safety Policy, a one-page statement that will give the framework for your program. This is a written statement of the employer’s commitment to protect the health and safety of employees at work.”
- “Depending on the size of your company, you will need to establish a Joint Health & Safety Committee or have the workers select a Health & Safety Representative. The Ministry of Labour has a guide that describes how to do this and it can be downloaded from their Web site.”
- “**Respect** the incredible diversity of our artists and the unique nature of each project.”
- “**Respond** to questions and requests as quickly as possible.”
- “**Require** your staff to comply with legislation, wear personal protective equipment and report hazards, injuries and incidents.”
- This is fairly new within the arts community but we must work together in the belief that workplace injuries and illnesses are unacceptable.

## **C4 – Dealing with Challenge and Conflict – led by Clark Reed**

A workshop to develop strategies regarding dealing with challenge and conflict.

### **What does conflict mean to cultural workers?**

- Conflict is usually viewed as a bad thing, to be avoided; should “keep the peace.”
- Conflict, if managed properly, can enrich; or if handled badly, can destroy relationships.

### **Model for Dealing with Challenge and Conflict: Tips and Techniques**

- The cultural sector has lots of areas of conflicts:
  - a. Demands for resources.
  - b. Overwork.
  - c. Tensions between artistic/administrative sides.
- Conflict offers opportunity: to innovate and to create more productive environments.
- Need to look at how you manage conflict: What is the cultural manager’s point of view?
  - a. Conflict with peers, staff, Board, patrons.
  - b. Wants to mediate, to help others.
- We all have a style, a dominant style that we keep going back to, but it may be inappropriate.
- **Five Styles for Dealing with Challenge and Conflict**
  1. Accommodate: to put your own desires on backburner, other person’s needs are met.
  2. Avoid: avoidance of the other person.
  3. Compromise: quick solution, both sides win, both sides lose
  4. Compete: I win, you lose, no one gives an inch.
  5. Collaborate: explore the problem, then explore options, style that gives best long-term outcome.
- Is there one you naturally default to?
- Q: What percentage of people would you say whose dominant style is collaboration?  
A: Statistically 45%.
- Q: Do you think we should use collaboration all the time?  
A: Need to be aware of the styles and choose when they are appropriate.

Session leader presentation is in borders, recorder notes are noted as addendum:

**Re-Generation: The Healthy Arts Leader  
Dealing with Challenge and Conflict**

**Accommodate**

- You put aside your own needs and wishes
- You place a high value on the relationship, low value on outcome
- Also appropriate when other person values outcome much more than you

**Tips:**

- *Don't be too quick to use this style*
- *Make it a proactive decision*
- *Be seen as cooperative, not weak*

**ADDENDUM NOTES**

- Make it clear to the other person that you gave something up; this is a potential bargaining chip for the future.

**Avoid**

- You side-step or withdraw from the conflict situation
- Neither the relationship nor outcome is very important to you

**Tips:**

- *Prevents anyone from resolving the conflict*
- *BUT – sometimes conflicts can resolve themselves when left alone*
- *Appropriate when you're unprepared*
- *Appropriate when there is danger or threat*

**ADDENDUM NOTES**

- Useful in a situation where the conflict will blow over.
- Saving your power for another time.
- Be cautious: when staff witnesses this approach, it might indicate you lack authority.
- Long-term avoidance is not appropriate.
- Useful when feelings are running high.

### Compromise

- You both look for a fair split between your positions
- You place a somewhat higher value on the relationship than the outcome

**Tips:**

- *Flexibility is key*
- *Needs a degree of trust, openness and mutual understanding*
- *Appropriate when you want quick closure*

### ADDENDUM NOTES

- Clarity of the facts is necessary; honesty will lead to a solution.

### Compete

- You win at the expense of the other person losing
- You place a high value on the outcome, low on relationship

**Tips:**

- *Not necessarily negative – has appropriate uses*
- *Appropriate when quick decision is crucial, or outcome is extremely important*
- *There's only one winner*

### ADDENDUM NOTES

- I win: you lose.
- Q: In what type of situation do you compete?  
A: When you think you are right.

### Collaborate

- You cooperate to find a mutually satisfying outcome
- You place a high value on both the relationship and outcome

**Tips:**

- *Requires trust*
- *Needs high-level communication and problem-solving skills*
- *Candidness and an open mind are key*
- *Share information, not potential concessions*
- *Can create false expectations*
- *Can take considerable time and energy*

## ADDENDUM NOTES

- Applicable when goal is long-term satisfaction.
- Hard to achieve with non-participative person.
- Make sure points are clearly articulated.

### Should we *always* collaborate?

**No.**

Use it when:

- Both parties will cooperate and participate
- End result is *very* important to both parties
- Your goal is long-term satisfaction and effective relationships

Avoid it when:

- You need a quick decision
- You need to take responsibility for a management course of action

### Making collaboration work

- Share information openly
- Encourage the other person to share needs and wants
- Explore multiple options
- Postpone discussion if feelings are running high
- Stick to collaborating before discussing solutions in depth
- Be creative in looking at the problem

### A "model" for collaboration

- Spend time discussing the problem
  - Both perspectives
  - Anything overlooked, any exaggeration or confusion?
- Generate lots of possible options
  - Explore competing views – are there noncompetitive ways to solve the conflict? Three, five, ten alternatives? Be creative.
- Agree on the best option
  - Work hard at finding an "out" – a way that ends your conflict to everyone's advantage.

### Choosing the best style

#### **Ask yourself:**

- 1) Is my relationship with him/her important, either for personal or business reasons?
- 2) Are we often in the same room because of common interests or activities?
- 3) Do I care what he/she thinks of me once we've resolved this conflict?
- 4) In the past, has my relationship with him/her involved a lot of communication?
- 5) Do I suspect that he/she has some hidden motives in this case?
- 6) Might the way we deal with this issue "set the scene" for handling future conflicts?
- 7) Is it worth spending a lot of time to resolve this conflict?
- 8) Will I feel badly if I don't get what I want in this situation?

### Consider your answers...

- When neither the outcome nor relationship matters to you, an Avoid style will probably be most effective.
- When the outcome is not important but the relationship is, an Accommodate style will probably be most effective.
- When the outcome and relationship are both very important to you, a Compromise style will probably be most effective.
- When the outcome and relationship are both very important to you, a Collaborate style will probably be most effective.
- When the outcome is important but the relationship is not, a Compete style will probably be most effective.

### Excellent communication skills .... the key to successful conflict resolution

- Maintain a supportive, *not defensive*, atmosphere.
- Stay assertive, regardless of temptations to behave otherwise.
- Actively listen:
  - Use body language to show you are listening
  - Focus on clarifying
  - Paraphrase and summarize when appropriate
- Continually probe for more information.
- Be sensitive to nonverbal cues.

### **Conflict with a difficult person**

- Be very clear with yourself about what behaviour bothers you.
- Face the behaviour in as non-threatening a way as possible.
- As always, be willing to listen attentively to the other person.
- Work on the conflict by trying to meet both your needs.
- Put the resolution into action.

### **ADDENDUM NOTES**

- The other person might never change: decide what you can achieve and live with.
- Be prepared to part ways.

### **Some final tips...**

- Separate individuals from problems.
- Be flexible about the other person's viewpoint or style of working.
- Accept that a different opinion or approach is simply different, not wrong.
- Don't attach negative labels to people.
- Continually focus on getting results rather than on your personal position.

The following are suggestions from the session:

- Regarding mirroring: you spend a lot of time listening to problems, not solutions; it might appear condescending, only use it when you really need clarification.
- Every situation will require a specific approach; be prepared to use any of the strategies presented.
- Regarding group collaboration:
  - a. Share information openly.
  - b. Encourage sharing of needs and desires.
  - c. Explore multiple options – trying to find a non-competitive solution.
  - d. Postpone discussions if feelings are running high.
  - e. Discuss all perspectives, generating many options.
  - f. Agree on the best option(s), satisfying all parties on some level(s).

## C5 – Organizational Self-Evaluation – led by Michelle Harkness

A workshop offering methods of self-evaluation that identify organizational health and structure in order to define strengths and weaknesses and target areas for change.

For Organizational Self-Assessment Checklist see pages 50 to 55.

**Session leader presentation is in borders, recorder notes are noted as addendum:**

<b>Organization Effectiveness and Evaluation</b> <b>February 7, 2005</b> <b>Michelle Harkness</b>
<b>Organization Effectiveness &amp; Evaluation Agenda</b>
Part A <ul style="list-style-type: none"><li>• Organization Design Overview</li><li>• Why Organization Design Is a Powerful Tool</li><li>• Galbraith's Star Model</li></ul> Part B <ul style="list-style-type: none"><li>• Organization Effectiveness Overview</li><li>• Impact of Internal and External Factors</li><li>• Considerations for Measuring Effectiveness</li><li>• How to Evaluate Effectiveness</li></ul> Part C <ul style="list-style-type: none"><li>• Exercise in Organization Effectiveness and Evaluation</li></ul>
<b>Organization Design Overview</b>
<ul style="list-style-type: none"><li>• Organization Design – <i>implementing the structural configuration that will support the business strategy.</i></li><li>• Organizations must be <b>designed</b> to be effective and efficient in achieving their purpose.</li></ul>

### ADDENDUM NOTES

- Any group of individuals has set systems that bring people together to reach a common goal.
- Organizational priorities can be found in job descriptions, hierarchy, etc.

## Organization Design

- Discipline aimed at improving performance and effectiveness.
- Organizations are not static – continuous interaction with external environment.
- CHANGE

### ADDENDUM NOTES

- Changes in mission and vision can alter goals; must be in tune with environment when considering organizational change.
- Every organization has unique needs.

## Organization Design

*Warren Bennis suggested three factors underlying the emergence of OD.*

1. Need for new organizational forms.
2. The focus on cultural change.
3. Increase in social awareness.

**Jay Galbraith's introduction of the four Immutable Forces:**

1. Buyer Power – designed around customers, e.g., Community
2. Variety – need to offer more products and services
3. Change – external factors, situational changes
4. Speed – faster response time, shorter lead times and cycle times

### ADDENDUM NOTES – STAR MODEL

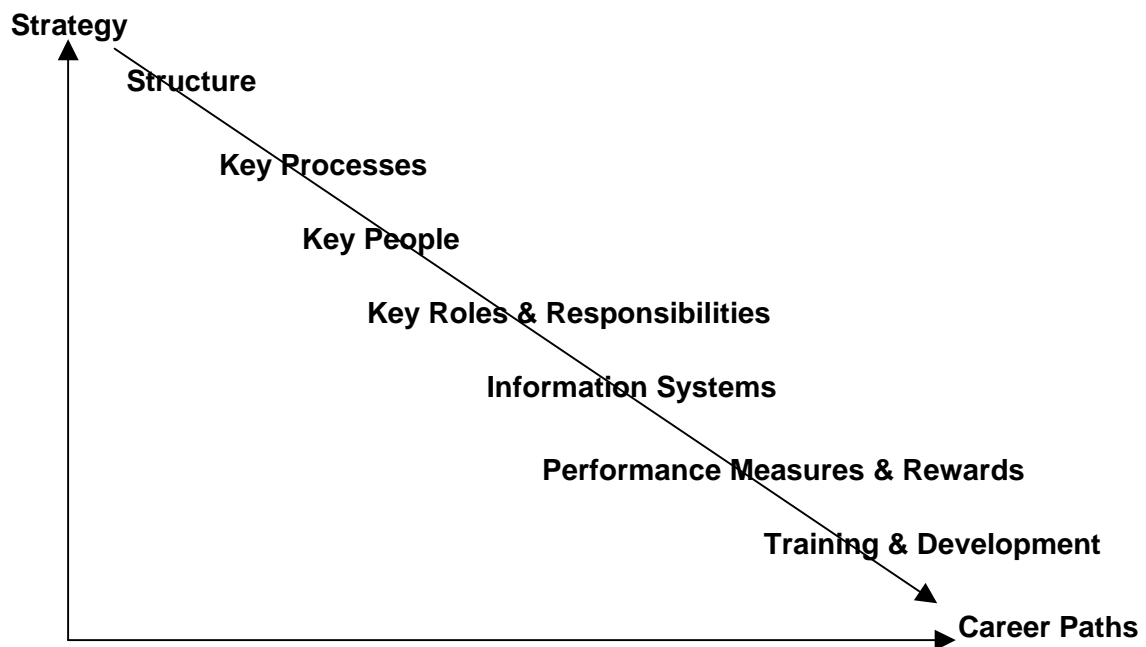
- Star Model can apply to all organizations.
- Ensures everyone is on the same page.
- Crucial to the identification of the team's focus, goals, and commitment.
- Every organization has its own unique structure.
- There are different structures within larger organizations, depending on the division's focus.
- Rewards – what is the motivation?
- People – recruiting an effective team.
- Any change made at the strategy level affects the other levels of the Star Model.
- Star Model is focused on "mission" and based on interconnectedness.

# The Star Model



Star Model, Galbraith, Design Organizations, 1995

# The Design Process



Galbraith, Designing Organizations, 1995

## Why OD Is a Powerful Tool

*Organization designs that facilitate variety, change, and speed are sources of competitive advantage.*

*The entire organization achieves the mission.*

*Design of your organization will impact culture, employee values, decision-making power, effectiveness.*

*Galbraith, Designing Organizations, 1995*

## All Encompassing Nature of OD

- Organization Culture
- Career and Succession Planning
- Change Management
- Communication Strategies
- Knowledge Management
- Creativity and Innovation Strategies
- Diversity
- Job Design
- Mergers and Acquisitions
- Organizational Effectiveness
- Performance Management Strategies
- Compensation and Reward Strategies

## Organization Effectiveness Overview

- Deploying your organization's strategy can be much more difficult than designing it.
- How do you know if your organization is achieving its goals?

## Measuring Effectiveness

*Companies with performance management processes significantly outperform their competitors, regardless of size on key indicators such as industry leadership, financial ranking and capacity to make organizational or operational change.*

*Conference Board of Canada,  
Using Measurement to Transform the Organization, 1996.*

## Measuring Effectiveness

- How do you determine effectiveness?
- How do you **MEASURE** effectiveness?
  - Feedback
  - Positive Reviews
  - Calibre of Artists
  - Number of Donors
  - Web Site Hits

## Effectiveness Factors – External and Internal Influences

- Arts and Culture Industry – hard to set measures.
- Subjective external analysis of artistic success and community impact.
- Your organization needs to establish its own unique measures – linked to strategic plans.

## Effectiveness – External Factors

- **Political** – funding, support of the arts, administration changes, structure of Board.
- **Economical** – jobless rates, ticket prices
- **Socially** – perception of organization during quiet and turbulent times  
*e.g., SARS, 9/11, Tsunami*
- **Technologically** – changes will impact effectiveness.

## Effectiveness – Internal Factors

- *Is your Mission effectively meeting established goals?*
- *Are you effectively using human, financial, technological resources?*
- *Do core fundraising events continue to emphasize your core mission?*

## Considerations for Measuring Effectiveness

- Performance measurement brings you to a concrete discussion about effectiveness.
- Public Sector Measures:

1. *Customer Service*
2. *Community Impact*
3. *Efficiency*

- Not recommending hundreds of measures, just specific measures that reveal success of the objectives.
- How effective is your organization at achieving its strategic objectives?
- How do you know when you have achieved your strategic objectives?

**ADDENDUM NOTES**

**METHODS OF MEASUREMENT:**

- Surveys.
- Company meetings.
- Statistics
- Calibre of artists.
- Number of donors.

***As Measured By...***

Take the big picture down to a functional, measurable objective.

*What do you want to know????*

1. What do you need to measure
2. What data will provide this information
3. What time frame is measure required in

*Every time someone suggests a goal or measure you should ask...*

***As Measured By...***

**Programs:**

- number of positive reviews... *As Measured by...*

**Marketing :**

- new patron acquisition... *As Measured by...*

**Fundraising:**

- organization meeting fundraising goals... *As Measured by...*

**Governance:**

- Board attendance – performances/exhibits...*As Measured by...*

## ADDENDUM NOTES

- Selection of measurable criteria requires creativity.
- What do you want to know?
- How can you get the data?
- What is your timeline?

## PRINCIPLES FOR ESTABLISHING MEASURES

- Root cause.
- Keep it simple.
- Key issues.
- Accountability.
- Avoid duplication.
- Feeds into performance improvement.
- Time frame.

**Q:** How do you improve the effectiveness of your organization?

**A:** Assess strengths and weaknesses and begin working on the weaknesses.

Every time someone suggests a goal or objective you should ask... **As Measured by...**

## D1 – Generational Diversity in the Arts – led by Jane Marsland and John Watson

A session to explore the differing needs, motivators and desires of different generations in our workplaces and audiences today.

<b>Governing values of our world (Western)</b>	<b>Current Frame</b>	<b>New Paradigm</b>
Win/don't lose	Self: I know the right answer	Self: I know a lot, but I don't know everything
Maintain control	Other individual: Is uninformed or ill-intentioned	Other individual: May know important things that I don't know
Avoid embarrassment		
Stay rational	Task: Get him/her to see things my way because I have the right answer	Task: How can we make the best choices together to achieve our goals? Possibility: we all have important point of view

To set the stage for a meaningful discussion, the room should be seen or conceived of as a container that holds conditions for possibility, safety and respect.

The concept of heroic mind set in the sector was discussed. Senior managers think they can solve all the problems by themselves and they become over-controlling and resistant to change.

Question asked by younger generation:

What are we doing that we can't accomplish our tasks at the given/certain time? (Objection and frustrations were expressed over the heroic mind set, unremunerated overwork, long hours, low pay because of the good of the arts, or because of the passion for the arts. Because the reality is that you become burned out and stressed and you lose your passion!)

- Redefinition of passion is necessary.
- What are the things that we deeply share with each other?
- What are the most critical values that draw us to the arts?

**Values** (shared by the participants), some they believe that exist, some should be built into:

- Being listened to.
- No assumption that age = experience.
- Ability to learn from others.
- Learning from peers.
- Respect.
- Using one's skills.
- Values of elders should be built into the organization (another way of listening culturally).
- Creating high-quality/transformational art.
- Money/time a sense of tension.
- Appreciation for work and effort.
- Challenge and achievement.
- Life-long learning.
- Value yourself and help correct others.
- Working and interacting with people you like.
- Having fun.
- Recognition and values of cultural diversity, recognition that not everybody comes from the same cultural background.
- Arts barometer of the society (how to continue my art, which is classic, to reflect the current society).
- Collaborations; sense of community.
- Mystery about work/experience; unpredictability of the work of art.
- Ability to live with the community.
- Having access to art.
- Balance and openness that speaks to the love of the art (core value).
- Meeting people in their own environment.
- Sharing of skills between generations.
- How should young generation keep things going (carving your own method)?
- Ability to make mistakes (lowering the pressure).
- Extraordinary trust.
- Learning from seniors.
- Knowledge support.
- Make a movement that makes a difference.
- Intergenerational staff to understand audience.

Q: How can we bridge the differing values between generations? Are these impossible barriers?

A: We can bridge the gap by building the culture of trust and respect.

## **D2 – Working in Crisis? – led by Teresa O’Neill**

A session that considers strategies to change how we approach our work.

Teresa O’Neill described her approach to workshops and her work as a life coach and thanked those who turned up for a topic such as "Working in Crisis" at the very end of a packed conference. She stressed that it was all about perspective, and the group could use being at the end of a full schedule positively – especially as this session would be different. Her process is to take individuals through questions and explorations so that they can take something personal away for their own use. Each person will acquire something different.

As the questions were to be addressed by individuals from personal experience, Teresa stressed that the workshop was a safe place and that confidentiality was essential in order for the respect to be maintained. Therefore, the items captured in point form below are topics and recurring themes that were more general, as opposed to any specific contexts or situations.

What brought you here? This question resulted in some common threads of crisis points:

- Organization currently in crisis.
- Desire to avoid crisis.
- Increasing levels of crisis.
- Crisis implying that issues must be addressed.
- Crisis as a catalyst for positive change.
- Personal crisis.
- Functioning in a crisis.
- Organizational transition.
- Stress.

Teresa provided everyone with a crisis safety “kit” that can be used as a tool for exploring crisis states, and which she said could be employed to help take control over one’s environment, circumstances, and perceptions and as a self-management tool to come up with strategies for handling crisis and change.

An exercise using a clothesline and “band-aid” and “heart” pegs was employed for an examination of crises. The band-aids were attached to stresses and hurts. The hearts were used by participants for those aspects of our selves and lives that were in need of re-affirmation, nurturing and strengthening. Participants were split up into pairs and shared personal stress stories from life and/or work environments; selected ones were then brought forward and discussed with the larger group and the facilitator. Then, a similar exercise was done with individual passions and visions, and a few of these were also shared with the whole room. Teresa was especially interested in identifying where these two sides might actually be linked, or conversely disconnected from each other.

Among the stresses and pains were these:

- Fear of failure.
- Lack of adequate information.
- Sense of being a “fraud” or being found not up to the task.
- Unreasonable timelines.
- Too much to do.
- Overload / exhaustion.
- Work / life balance issues.
- Career changes.
- Personal life changes and their effect on work.

Among the joys, visions and passions were these:

- Belief in the company and the art being produced.
- Organizational values in line with personal beliefs.
- Passion for the artists, performers and the art form itself.
- Satisfaction of achievement.
- The privilege of doing what one really loves.
- Multitude of opportunities.
- Reclaiming self.
- Connectedness to others.

Teresa concluded by discussing the importance of doing nothing when we are out of balance as a means of taking stock. Often working in crisis can be repositioned by something as simple as finding whatever achieves a reconnection with a place of value. She stressed the importance of stepping outside the immediate circumstances, seeing the bigger picture, and placing yourself (including your pains and passions) into that framework.

### **D3 – Cluster Management – led by Christine Moynihan and Lisa Nabieszko**

A session about proven and practical models for sharing resources and collaboration.

Cluster arts management organizations are generally established as not-for-profit corporate structures. The organization provides a menu of arts management services at subsidized rates.

The cluster arts management model was developed in Ontario with the support of a multi-year public funding investment with the Canada Council for the Arts and the Ontario Arts Council. This funding commitment established the Dance Umbrella of Ontario (DUO). Subsequently, Small Theatre Administrative Facility (STAF) was formed.

The core operating value of a cluster arts management model is “first come, first served.” The organization therefore does not select the clients. Therefore, an independent artist can be a guaranteed professional, highly qualified arts administrator regardless of other indicators such financial ability, merit or peer assessment.

### **Guest Speakers' comments**

- The speakers reviewed the background of the cluster arts management model. The originating concept referred to Pentacle Arts Management in New York that was established over 25 years ago.
- The model provides an administrative support mechanism for independent artists to develop and enhance their arts management capacities. Benefits include providing subsidized professional arts administration expertise that is normally unavailable to individual artists due to the cost of contracting established expertise.
- In Ontario, several arts managers attempted to establish this mechanism without the support of public funding. Each of these organizations was unable to sustain their activity.
- In 1988 the Ontario Arts Council developed a program to support a cluster dance management organization in partnership with the Canada Council for the Arts (a three-year pilot project). The Canada Council for the Arts subsequently expanded the program to support dance umbrellas in Vancouver and Montreal.
- In 1991, Lisa Nabiesko completed a survey for the OAC Theatre Office in order to establish a theatre-based umbrella program at the OAC.
- DUO and STAF have successfully provided arts administration services in their designated jurisdictions for over ten years.
- Lisa presented examples of other models including cross-disciplinary models. Both Lisa and Christine have undertaken regional surveys predicated on establishing regional cross-disciplinary models.
- Both organizations continue to address the constituents' needs. STAF now provides fundraising services and DUO provides tour marketing. Both organizations reported that they have become more involved in the management of the clients' business rather than a menu-driven service system that established the organizations.
- The operational challenges of the cluster management model follow:
  - a. The model requires a multi-year funding commitment from the public arts funders.
  - b. The artists and/or arts organizations must demonstrate a commitment to support this type of service organization.
  - c. Time management challenges resulting from multiple requests from the clients.
  - d. Operating policies/principles must be defined to ensure equitable service delivery.

- e. This model has demonstrated that the function can support some, but not all of the administrative needs of the artist (such as Board management/development).
- f. The client relationship must be established with the organization, not the organization's employees/sub-contractors.
- g. The artist (client) is responsible for the writing of the grant materials to ensure the articulation of artistic vision and practice is distinct and unique.
- h. The service request or need is larger than the human resource capacity of the organization. Therefore, the organization must establish its limitations to ensure quality and effectiveness of service.

**In the group discussion, participants noted the following:**

- The opportunity for local artists to share resources and gain access to professional arts administration is worthy for continued discussion.
- This type of organization requires public arts funding in order to get started and to be sustained.
- The examples/models that were discussed support performance-based arts practices and, therefore, a different model/system for writers, visual artists, etc. Would have to be explored.
- Various capacity-building grant programs available to Ontario artists/arts organizations could support the necessary research and initial funding for this type of service organization.

**Concluding observations:**

- DUO and STAF have changed the arts landscape in their jurisdictions ensuring that individual artists and small-scale arts organizations have a greater understanding of the business of the arts.
- Both organizations have contributed to their constituents' capacities and abilities to access opportunities that support their artistic missions and activities.
- As a service organization model, the role is one of animator and facilitator that generate opportunities for artists.
- 

**D4 – Designing and Implementing an Internship Program – led by Karen Ennis, Bob Johnston and Catherine Smalley**

A workshop to explore the design and implementation of an internship program.

**Catherine Smalley from the Metcalf Foundation**, a private family foundation that provides programming in the performing arts, the environment and communities, described the Metcalf Internship Program.

The Metcalf Internship Program supports training and professional development for artists, administrators and production staff in the performing arts. The program is intended to provide meaningful training for the interns and is not meant to replace or augment staff within an organization.

The budget is about \$400,000 a year, funding 20 to 24 internships. A feature in the reporting follow-up is a yearly meeting of interns that allows them to exchange stories and ideas and to forge connections giving the foundation another measurement tool.

Applications from arts organizations are evaluated by a committee from the arts community, which makes recommendations to the Metcalf Foundation Board; results are available two months after the application deadline.

Full details on the internship program and other Metcalf Foundation arts programs are available at <http://www.metcalffoundation.com/intern.html>.

**Karen Ennis and Bob Johnston from Cultural Careers Council Ontario** described the Youth Wage Subsidy and the Income Managers programs. The CCCO's programming is funded through various levels and departments of government.

The Youth Wage Subsidy Program helps youths (30 years or younger) to improve their prospects in the cultural sector. Half of the wages are the responsibility of the participating arts organization; the CCCO pays the other half. Eighty-seven interns have been engaged over the past four years in internships that last between 4 and 10 months.

The applications are judged by a jury from the community that makes decisions based on the ability of the arts organization to provide a good experience for the intern and on the capacity of the organization to carry out an internship program. Information about the program is available at <http://www.workinculture.on.ca>.

The Income Managers Program combines seven weeks in the classroom (at the University of Waterloo) with on-the-job experience in fundraising and marketing at arts organizations. Unlike in the Youth Wage Subsidy program, the applicants are assessed, rather than the arts organizations, and they must have some experience in the arts. Most of the successful graduates find placements in the cultural sector. Funding for the 2005–06 program has not yet been confirmed, but more information about the program is available at <http://www.workinculture.on.ca>.

## D5 – Recruitment and Selection – led by Nina Small

A workshop offering practical information for successful recruitment and selection as well as legal pitfalls to avoid.

Session leader presentation is in borders, recorder notes are noted as addendum:

### Recruitment and Selection Re-Generation Conference Presented by, Nina Small

#### re·cruit·ment

Pronunciation: ri-'krüt-m&nt Function: *noun*

1 : the action or process of [recruiting](#)

2 : the process of adding new individuals to a population or subpopulation (as of breeding individuals) by growth, reproduction, immigration, and stocking; *also* : a measure (as in numbers or biomass) of recruitment

#### Objectives

- ▲ Basics of Recruitment and Selection Processes
- ▲ Interview and reference checking pointers
- ▲ Human Rights Code as it applies to hiring

#### Recruitment and Selection

- ▲ Recruitment is the process of attracting the right individuals with the required skill sets, experience and qualities to perform the position for which you are hiring
- ▲ Selection is a process designed to help you choose the best person for the position
- ▲ Once the individual is on the job you need to think of retaining and motivating

## Recruitment Options

- ▲ There are many recruitment options, however some can be quite expensive.
- ▲ Carefully consider what avenues will provide you with the best return for your investment, your time and your human resources.
- ▲ For a minimal markup, consider advertising companies.
- ▲ Most expensive and inflexible:
  - Newspapers, local community papers, and papers and magazines with a specific readership
- ▲ Moderately expensive and flexible:
  - Internet job boards like Monster.com, Workopolis, Charity Village and list serves
- ▲ Least expensive and most flexible:
  - Free Internet job boards, job boards within organizations, trade list serves, school career centres, employment centres, and of course, word of mouth
- ▲ CCCO's Work in Culture Web site, [www.workinculture.on.ca](http://www.workinculture.on.ca)
- ▲ CHRC's Culture Works Web site, [www.cultureworks.ca](http://www.cultureworks.ca)

### ADDENDUM NOTES

- Take the time to find out what type of person you are seeking for the best fit.
- Ensure that the job description is up to date.
- Sample job descriptions are on the CCCO Web site at [www.workinculture.com](http://www.workinculture.com).
- The whole process can take two months from posting.
- Posting should be live for three weeks.
- Allow for three weeks for application deadline.
- **Other Web options:** Work In Culture (free), Cultureworks (free), Internet job boards.
- **Other options:** circulate e-mail, HRDC, Canadian Heritage Museums and Galleries (free).

### **Creating the Posting**

- ⤴ At a minimum, the job posting should include the title of the position, how the person should submit an application and the submission deadline
- ⤴ Better chance of getting qualified individuals by identifying the skill sets, experience and behaviours required
- ⤴ Good opportunity to express organization's priorities
- ⤴ Show organization's work culture

### **ADDENDUM NOTES**

- The more details the better, including non-negotiable skills required.
- Ensure that minimum requirements are valid.
- Include organization's strategic priorities in posting.
- If you won't be contacting all applicants, say so in posting.
- If applicant requests feedback, it should be provided.

### **Selection Process**

- ⤴ Create spreadsheet to log applications received, and to indicate whether they meet the required criteria
- ⤴ Have hiring manager/colleague review short-listed applicants
- ⤴ Select who will conduct the interviews
- ⤴ Optional – pre-screen candidates by phone
- ⤴ Conduct face-to-face interviews, 1st and 2nd rounds
- ⤴ Use grid to rate candidates based on required areas and always keep notes
- ⤴ Check references
- ⤴ Offer written employment contract
- ⤴ Communicate rejections

### **ADDENDUM NOTES**

Pre-screening is optional and might include

- Identifying aspects of the job and asking the candidate by phone if that is acceptable.
- Testing for bilingualism.

Recruitment agencies:

- Are an option, but can be expensive.
- Are useful if you don't have the time to recruit yourself.
- Ensure the candidate knows how many people will be interviewing them and how long the interview will be.
- If presentation skills are required, ask the candidate to do a PowerPoint presentation.

If writing skills are required, ask the candidate to provide writing samples.

### **Interview Techniques**

- ▲ Trends in interviewing, for example, psychological testing, stress interview, group interviews, etc.
- ▲ Preferred method – behavioural description interviews and open questions
- ▲ Avoid asking leading or closed questions
- ▲ Ask the same questions
- ▲ Only ask questions applicable to the job
- ▲ Make a good impression

### **ADDENDUM NOTES**

Interview with someone else – another manager or selection committee.

- Ensure the interview environment is comfortable: provide water, be welcoming, and don't stand while candidate is sitting.

As interviewer, make sure you are familiar with

- Job description and skill sets being sought.
- Human Rights Code; what you can and can't ask.

### **General Interview Questions**

- ▲ Weaknesses and strengths
- ▲ What would your references/current supervisor say about you?
- ▲ What three words would you use to describe yourself?
- ▲ What type of environment/people do you work best with?
- ▲ Describe a positive supervisory relationship...
- ▲ Why are you looking for a change in employment?

### **ADDENDUM NOTES**

Behavioural-based questions

- Entail asking the candidate to describe an actual experience they have had relating to the topic being covered.
- Should relate to the skill sets required for the job in question.
- Typing tests can be arranged through agencies.
- Scenario question: use a real-life example of a situation and ask the candidate to write a solution down, giving them enough time.

### **Reference Checking**

- ⤴ Always check at least three references
- ⤴ Make sure that one reference is a recent employer
- ⤴ Ask the same questions
- ⤴ Take notes
- ⤴ Open-ended and non-leading questions

### **ADDENDUM NOTES**

- Don't tell the reference too much about your organization, you don't want to feed them an answer.
- Tell the reference that, due to privacy laws, the candidate can have access to the information they provide.
- Always inform candidate that you will be checking their references.

### **Reference Questions**

- ⤴ Confirm how the reference knows the individual and for how long
- ⤴ Ask about specific skill sets, and any concerns that may have arisen during the interview
- ⤴ Ask whether the individual would be re-hired
- ⤴ Strengths and weaknesses
- ⤴ Attendance record
- ⤴ Ability to get along with others
- ⤴ Management style
- ⤴ Anything further to add

### **ADDENDUM NOTES**

- Best to check references between first and second interviews, giving you more material to ask about in the second interview.
- Not all organizations will participate in reference checks due to privacy laws.
- Ensure you have a signed contract before letting other candidates know they don't have the job.
- If rejected candidate asks for reason, be honest, it may help them in future.

### Human Rights Code

- ⤴ The grounds in the Code apply to job postings, applications, interview and reference questions
- ⤴ Only items applicable to the requirements of the position should be noted, then Human Rights Code violations will be avoided
- ⤴ Avoid asking personal questions at all costs
- ⤴ Can ask if the candidate is able to meet the requirements of working late, travel, weekends

### ADDENDUM NOTES

- If a job requires tasks you need to confirm the candidate is able to do, you can ask if they have any issues with carrying out the specific task.

### Other Resources

- ⤴ *CHRC's Recruiting the Right People booklet*
- ⤴ *Developing Human Resources in the Voluntary Sector – staffing page*  
[www.hrvs-rhsbc.ca/staffing/pg001\\_e.cfm](http://www.hrvs-rhsbc.ca/staffing/pg001_e.cfm)
- ⤴ [www.head2head.ca](http://www.head2head.ca) newsletter
- ⤴ *Charity Village news and events* [www.charityvillage.com](http://www.charityvillage.com)

## **D6 – Human Rights – led by Neil Edwards**

An introductory workshop on the Ontario Human Rights Code as it affects the workplace.

### **What arts managers need to know about human rights in the workplace**

Neil Edwards  
Director, Mediation and Investigation  
Ontario Human Rights Commission  
February 7, 2005

#### **Presentation outline**

- Public Policy: Aims of the *Code*
- Social Areas and Grounds of the *Code*
- Discrimination
- Disability
- Importance of the *Code*
- Human Rights Commission
- Human Rights Principles
- Other Legislation
- Questions and Answers

#### **Public policy: aims of the *Code***

The aims of the *Code* are:

- Support inclusion and respect
- Recognize the dignity of every person
- Promote equal rights and opportunities free of discrimination and harassment
- Full participation by all
- Remedial nature of legislation

#### **Importance of the *Code***

- Prohibits discrimination on 16 grounds in the areas of goods, services and facilities, employment, housing, contracts, and vocational associations
- Individuals and corporations can be held vicariously liable for infringement of rights under the *Code*.

### **Social areas**

- Services, goods and facilities
- Occupancy of accommodation
- Contracts
- Employment
- Membership in vocational associations

### **Prohibited grounds**

- Race
- Ancestry
- Place of origin
- Colour
- Ethnic origin
- Citizenship
- Creed
- Sex (pregnancy)
- Sexual orientation
- Same-sex partner status
- Disability
- Age
- Marital status
- Family status
- Receipt of public assistance (accommodation)
- Record of offences (employment)

### **Discrimination**

Any practice or behaviour, whether intentional or not, which has a negative effect on an individual or group because of a prohibited ground

### **Harassment**

- “Engaging in a course of vexatious comment or conduct that is known or ought reasonably to be known to be unwelcome”
- Prohibited in all social areas based on all *Code* grounds
- Sometimes accompanied by threatening or violent behaviour

### **Poisoned environment**

- Based on the impact of comment(s) or action(s) on individuals rather than frequency
- Could be caused by a single comment or action
- Can result from comment(s) or action(s) of any person including a co-worker, supervisor and manager

### **Disability**

any degree of:      physical disability,  
                                 infirmity,  
                                 malformation or  
                                 disfigurement

that is caused by:    bodily injury,  
                                 birth defect or  
                                 illness

and, without limiting the generality of the foregoing, includes:

- diabetes mellitus,
- epilepsy,
- a brain injury,
- any degree of paralysis,
- amputation,
- lack of physical co-ordination,
- blindness or visual impediment,
- deafness or hearing impediment, muteness or speech impediment,

or physical reliance on a:

- guide dog or
- other animal or
- on a wheelchair or
- other remedial appliance or device, a condition of mental impairment

or

- a developmental disability,
- a learning disability, or
- a dysfunction in one or more of the processes involved in understanding or using symbols or spoken language,
- a mental disorder, or
- an injury or disability for which benefits were claimed under WSIA

### **Duty to accommodate**

- The duty to accommodate is the legal requirement for employers and service providers to proactively eliminate employment practices, standards and rules that discriminate on the basis of a prohibited ground
- This can include standards, rules and practices that may appear neutral but adversely affect certain groups

### **Violations of the *Code***

Violations of the *Code* may lead to complaints to the Commission that can be expensive due to:

- Potential of corporate liability
- Costs associated with defending a complaint
- Lower productivity
- Increase absenteeism
- High rate of employee turnover

### **Personal costs**

- mental anguish
- physical health affected
- loss of income, job, benefits
- interruption of career
- damage to self-esteem
- damage to relationships
- isolation in the workplace

### **Organizational costs**

- employee turnover
- retraining
- absenteeism, low morale, decreased productivity
- litigation
- increased cost of benefits
- tarnished public image

## Human Rights Commission

The Ontario Human Rights Commission:

- Receives complaints and conducts investigations
- Advances human rights policy
- Produces policy and guideline resource materials
- Public education
- Public interest mandate

## Human rights principles

- Discrimination need only affect one person (in a group) for a complaint to be filed
- If a ground of discrimination is only one of several reasons for a decision affecting a person, that is sufficient reason to investigate a complaint
- "Perception" that a person is covered by a ground may be enough to file a complaint

## Other legislation

- *Employment Standards Act, 2000*
- *Labour Relations Act, 1995*
  - Collective agreements deemed to include non-discrimination clause
  - Arbitrators can interpret and apply **Code**
- *Occupational Health and Safety Act*
- *Workplace Safety and Insurance Act, 1997*

## Reference material

- Guide to the *Human Rights Code*
- Hiring? A Human Rights Guide
- Human Rights at Work
- If You Receive a Human Rights Complaint: A Respondent's Guide
- Pregnancy, Before, During & After: Know Your Rights
- Racial Slurs and Harassment and Racial Jokes
- Sexual Harassment and Other Comments or Actions about a Person's Sex
- Policy and Guidelines on Disability and the Duty to Accommodate
- Policy on Discrimination and Harassment because of Sexual Orientation
- Policy on Discrimination and Harassment Because of Gender Identity

- Policy on Discrimination Because of Pregnancy and Breastfeeding
- Policy on Employment-related Medical Information
- Policy on HIV/AIDS-Related Discrimination
- Policy on Racial Slurs and Harassment and Racial Jokes
- Policy on Sexual Harassment and Inappropriate Gender Related Comments and Conduct

ALL OHRC documents are available on the Web site:  
[www.ohrc.on.ca](http://www.ohrc.on.ca)

### **Contacting the commission**

You can reach the Commission by:

- Phone: 1-800-387-9080  
(in area code 416 & 905) 416-326-9511
- TTY/TDD: 1-800-308-5561  
(in area code 416 & 905) 416-314-6526
- Fax: 416-326-9520

### **On the Internet**

Web: [www.ohrc.on.ca](http://www.ohrc.on.ca)  
e-mail: [info@ohrc.on.ca](mailto:info@ohrc.on.ca)

Publications Ontario:  
1-800-668-9938  
or (416) 326-5300  
<http://pubont.stores.gov.on.ca/pool/english/catalogue.asp>