



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**

**Plenary Sessions**

**February 6 and 7, 2005**

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ONTARIO ARTS COUNCIL  
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# PLENARY SESSIONS

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## Executive Summary

In his welcoming remarks to the 312 participants who attended the Ontario Arts Council's (OAC) *Re-Generation: The Healthy Arts Leader* conference, John Brotman cited OAC's commitment to assisting arts organizations in building capacity and developing strength, by investing in human capital, as the reason for developing and hosting the conference. In partnership with The Samuel and Saidye Bronfman Family Foundation; the Ontario Ministry of Culture; the Ontario Trillium Foundation; the Department of Canadian Heritage; the George Cedric Metcalfe Charitable Foundation; and the Canada Council for the Arts, OAC was able to further the work it began in 2003 with the *Forum for Arts Specialists and Mentors* by providing professional development and networking opportunities to an even broader range of arts employees.

The conference schedule included plenary sessions in the morning and early afternoon of both days, with two subject breakout sessions offered on both afternoons. The plenary sessions on Sunday, February 6, 2005, included the following:

Nora Spinks of Work-Life Harmony Enterprises, lead speaker on day one of the conference, spoke on issues of "wellness, managing for wellness, modelling and mentoring healthy behaviours." Her focus on the diversities of the Canadian workplace offered all generations attending insights into each other's values and motivations regarding employment. That there are not enough workers to fill positions in the next decade is indisputable. The "nexus" and "velos" generations have been identified as committed to their work, under the right circumstances; they require more input and control over their work lives than their "boomer" predecessors. A trend identified by Ms. Spinks – based on the example of the Health and Safety Executive of England's "Stress Code" – is that the onus will be on all employers in the future to ensure that stress levels in the workplace are kept within reasonable limits.

The *Mentorship Strategy Discussion*, led by members Jean Malavoy and Sibyl Frei, of the Creative Management Project (CMP), was a working session to respond to the CMP's *Draft Mentorship Strategy for Managers and Administrators of Cultural Organizations*. The participants identified priority actions and stakeholders for the various objectives identified in the draft report.

*Challenges in Professional Development* was led by Bob Johnston and Susan Cohen of Cultural Careers Council of Ontario. Existing programs and suggestions from recent Chalmers Conferences were introduced followed by an offering of highlights of a soon-to-be-released report relating to training needs and resources in Ontario's cultural sector. Highlights include the definition and

enumeration of skill areas for cultural workers and the development and ranking of various learning formats as they relate to specific skills.

The plenary sessions on the second day of the conference – Monday, February 7, 2005 – included the following:

A recap of the peer breakout sessions that took place on the afternoon of Sunday, February 6, was done by facilitator Mary Rowe. Key points included these: the mentorship relationship must be defined clearly by both mentor and mentee; there is debate on the issue of accreditation for arts managers; Boards of Directors need to take a lead in human capital issues; and flexible work environments will be prominent in the future.

Andrew Taylor, Director of the Bolz Center for Arts Administration, was the lead speaker for day two of the conference. Andrew's speech was titled "Managing Metaphors" and suggested that "we may be reinforcing and entrenching the very problems we hope to solve" by relying on metaphors. Andrew went on to say, "Arts and cultural managers are in the *business* of metaphor, symbol, narrative and meaning. Why not engage more of that capacity in exploring the ways we describe and understand what we do?" Some of the metaphoric examples shared with the group include *Production and Consumption* – relating to the act of producing art and the audience consuming it; *The Fiscal Year* – is this an appropriate measure for what we do?; *Partnership* – "the term and the metaphor of partnership can often blind us to the connections that already exist.... We are really just recognizing a connection that already exists...."

A panel on succession planning was organized by the conference's Young Managers' Roundtable steering committee, based on their desire to see the issue addressed openly. Yvette Nolan of Native Earth Performing Arts Inc., Kim Tomczak of V tape, William Lau of Little Pear Garden, and Kathleen Sharpe of Ontario Cultural Attractions Fund each offered a précis of their experiences with succession planning. The question and answer period that followed concluded in a consensus that documentation and a strong narrative are useful succession planning tools. Another critical conclusion is that Boards of Directors must be encouraged to ensure the question of succession planning is always on the radar.

Rick Lash of the Hay Group facilitated *The Leaders' Journey*. In defining leadership excellence, Rick demonstrated various transitions that all leaders/heroes go through. Based on the work of Joseph Campbell, the six stages of the leader's journey include The Call; Preparation; Crossing the Threshold; Finding Support; The Road of Trials and Facing the Abyss; and finally Transformation and Return. Film clips from *Dead Poets Society*, *Shirley Valentine* and *The Lord of the Rings* illustrated various stages of the leader's journey.

There were six peer breakout sessions on the afternoon of the first day. The delegates worked in cross-sectoral groups, with others who had close to the same number of years' experience. Each group was asked to discuss a topic that related to their demographic group.

The later breakout session on Sunday afternoon and both of Monday's breakout sessions were made up of 18 individual topics relating to human resources in arts organizations. Some sessions offered hands-on tools while others were of a more exploratory nature. Subject breakout sessions were the following:

1. Managing Change – New Tools for Managers
2. Arts Management 101
3. Exploring Partnerships
4. The Changing Face of Arts Organizations
5. Performance Management
6. Developing a Compensation Strategy
7. Organizational Self-Evaluation – Aboriginal and Culturally Diverse Arts Practices
8. The Value of Mentorship
9. Surviving Transitions
10. Occupational Health and Safety
11. Dealing with Challenge and Conflict
12. Organizational Self-Evaluation
13. Generational Diversity in the Arts
14. Working in Crisis?
15. Cluster Management
16. Designing and Implementing an Internship Program
17. Recruitment and Selection
18. Human Rights

Session leaders for the subject breakout sessions were drawn from both the arts and the HR sector.

The conference closed with an open-microphone session, allowing delegates to share their observations and concerns.

## Plenary Sessions – Sunday, February 6, 2005

### Summary of Nora Spinks's speech

Mary Rowe, the conference facilitator, introduced one of the conference focuses, which would be the making of connections between the "elders" in the arts sector and its newcomers and how the entire Canadian workforce is faced with these issues. Mary then introduced lead speaker Nora Spinks.

Nora outlined her topic: "wellness, managing for wellness, modelling and mentoring healthy behaviours" to take back to our respective workplaces to "demonstrate what healthy leadership is all about." She summarized data pertaining to the "Nexus" and the "Velos" generations, Nexus being those currently between 25 and 34 years of age, the generation that forms the nexus between those born before and after the development of the internet; and Velos being those currently between 16 and 25 years of age, named for the speed at which they embrace change. Nora affirmed that today's workforce is a blending of multiple generations; where historically there was a sequential hierarchy, today we often have older generations reporting to younger generations. The underlying theme of work-life harmony is essential to develop effective management strategies to encompass all the trends in today's workplace.

As background to her speech Nora reminded us that

- As healthy leaders it is essential we understand "the significance of the diversification of the workforce: age, gender, culture and generations."
- The worker shortage is here – we won't be able to replace the workers that are expected to leave the workforce.
- A change in the age of mandatory retirement will not solve the worker shortage problem because people are pushed or pulled out of the workforce for various reasons, including burnout, health and family commitments.
- As leaders in our fields, we need to deal with the issues workers face in order to keep people in the workforce.

In pointing out that we might ask ourselves why we need to deal with these issues, Nora reminded us that the monetary consequences of inaction are seen in very high recruitment and training costs as well as continued turnover. We also need to realize that the talent we are seeking in the arts sector is also being sought globally in other sectors. The concept of "Development" as a strategy in HR planning is essential in creating dynamic and healthy organizations, no matter what generation we are considering.

The Nexus generation will not sell their soul to their work; although they do not lack in passion, they have a very clear sense of balance between their work and personal lives. Referring to an October 2004 study, *Generation and Gender in the*

*Workplace*, published by Families and Work Institute, Nora identified three distinguishing features of the generation of new, young leaders:

1. There is “less gender differentiation than ever before,” and the work expectations and demands for balance are the same for both men and women.
2. They are more likely to be family-centric than preceding generations.
3. They are not interested in assuming roles of increased responsibility without the support and resources to do a good job and meet the commitment; they will not threaten their personal, professional or spiritual self for their work.

All of these features are substantiated by the increased number of men taking paid parental leave.

Offering “a little bit of insight,” Nora demonstrated that in order to better understand and interpret people’s behaviour in the workplace, we need to remind ourselves of their childhood experience and what they were exposed to in the formative, impressionable period of 9 to 13 years old. It is in these years that the core of who we are and the foundation for our work expectations are formed. With the help of delegates, a quick picture of the Nexus and Boomer generations was drawn:

<b>In Toronto</b>	<b>Nexus Generation</b>	<b>Boomer Generation</b>
<b>In formative years, were exposed to:</b>	<ul style="list-style-type: none"> <li>• First Iraq war, war in the living room</li> <li>• Recession and lay-offs</li> <li>• Parents unable to predict their future</li> <li>• High divorce rate and beginning of co-parenting</li> </ul>	<ul style="list-style-type: none"> <li>• Stable jobs</li> <li>• Divorce with sole custody with visitation rights</li> </ul>
<b>What told about work:</b>	<ul style="list-style-type: none"> <li>• Multiple careers</li> <li>• Learn for life</li> <li>• Constant change is normal</li> </ul>	<ul style="list-style-type: none"> <li>• Job for life</li> <li>• Work hard and you’ll do well</li> </ul>
<b>Attitude to work:</b>	<ul style="list-style-type: none"> <li>• “Work sucks”</li> <li>• “Co-workers are idiots”</li> <li>• “Bosses are jerks”</li> <li>• First jobs in service industry</li> <li>• Shorter term of commitment</li> </ul>	<ul style="list-style-type: none"> <li>• Long-term commitment</li> </ul>

Once we have this “insight” into better understanding people in our workplace, we must ask ourselves what more do we need to know and how do we leverage this information. Both the Boomer and Nexus generations are seeking a values fit with their organizations. The Nexus generation is characterized by being very independent – being the first latch-key generation; being from smaller families; having the ability to multi-task; and being considered creative and expressive. Knowing these things, we can endeavour to mix the various generations appropriately in work arrangements in order to create healthy work environments.

*“The more you understand about demographics and where some of these behaviours come from, the easier it will be for you to manage the folks around you.”*

Although arts work is not ranked high for young people (from 17 to 30 years) as preferred work, there is a correlation between the values identified by young people as important and those sought by arts employers.

In addressing the issue of retention, Nora made the point that workload is the number one concern for all generations in the workforce. Based on the formative experience or history, each generation has a different approach and attitude to being asked to do more with fewer resources. Where the Boomers might work harder and longer, the Nexus generation will not. We need to create environments that recognize the limitations of employees and make allowances for them.

The Velos generation is used to easy access to speedy methods of communication, so we need to adapt and change many elements of our work environments, including work design, workload allocation, methods of communication and career and time structure. For the Velos generation, face-to-face encounters are reserved for personal and social purposes; they are not considered necessary in the workplace. In the re-thinking of our work environments we need to be aware that time is a commodity to be bought and sold, but again, it has different meanings to different generations.

*“The Nexus and the Velos generations will give you 150 percent when they are there. They’re just not going to be there 24/7.... They know how to manage 24/7. They know how to balance their own time and their relationships. They know that you’ll never be done....”*

Nora identifies the Velos generation as a group committed to the people they work with, not necessarily the organization they work for. This generation moves in packs. Their loyalty goes to those who treat them fairly and whom they

respect. Environments that cultivate and allow these relationships to be developed are essential for success.

Delving deeper into the differences between generations and their response to the workplace, Nora solicited the following from the delegates:

	<b>Boomers</b>	<b>Nexus</b>	<b>Velos</b>
<b>Parent/child relationship</b>	<ul style="list-style-type: none"> <li>• Don't ask</li> <li>• Do as told</li> <li>• Discipline by punishment</li> </ul>	<ul style="list-style-type: none"> <li>• Limited parental time</li> <li>• Responsible</li> <li>• Negotiation</li> <li>• Discipline by consequences</li> </ul>	<ul style="list-style-type: none"> <li>• Discipline by negotiation</li> </ul>

When the Nexus and Velos generations enter a workforce full of rules, their instinct is to negotiate. A Boomer's response to this might include questioning their level of commitment or their own ability to trust an employee. We must recognize and find strategies to work with the Nexus and Velos generations' instinct to negotiate, while balancing each generation's expectations.

A concept that has changed over the last few decades is that of breaks. Traditionally, we were schooled, we worked and we retired. Today, those three activities are all mixed in at various times in our lives. The challenge faced by managers is not knowing when to expect breaks from employees. Nora identified four "bargaining chips" that can help in the management of people:

1. Time.
2. Training and Development: The current standard for Training and Development is 1.5 to 2 percent of your organization's HR budget. That norm is expected to increase in the next five years owing to the "learn for life" characteristic of the Nexus generation. If an organization does not give them the resources to succeed or offer appropriate challenges, people will move on.
3. Feedback: Both the Nexus and Velos generations thrive on instant and detailed feedback. They grew up with very detailed report cards and if they don't receive adequate feedback they think you don't care. Their feedback should be "fast, frequent, complete, concise, direct, with reasons and rationale."
4. Clear work assignments: The more thorough and well thought out a work assignment is, the greater the chance it has of getting done.

Dealing with various generations simultaneously in the workplace requires both great care and the use of different techniques for each generation in order to match their needs. The key to this challenge is creating an environment of fairness. Treating people and generations differently is acceptable, providing

there is a perception of fairness. Nora pointed out that this challenge requires both attention to detail and emotional intelligence. "It's this kind of environment that will magnify the good. The better manager you are, the more extraordinary you will look in this environment. The poorer you are as a manager, that too will be magnified." For success as a manager dealing with these issues you must model behaviour and follow through on everything you say with action; otherwise you will be dismissed by the younger generations, and they will not perform for you.

*"The management vacuum is becoming one of the biggest challenges for executive leadership across all sectors."*

The number one reason that people don't want to go into management is the example they currently see of bad managers: working long hours, receiving no recognition, being overstressed and burning out. Although the next generations of potential managers want to work, assuming roles and responsibility, they don't want the kind of life that is currently being modelled. Nora cited the school system as facing a serious shortage of vice-principals in the next few years, causing school boards to have to restructure their entire systems because of a lack of people willing to manage. All sectors are facing this same problem.

*"We need to model behaviours that are going to excite people, not turn them off."*

In conclusion, Nora offered the following strategies to encourage employees to stay:

1. Show respect. Listen more than you talk and conduct yourself in the way you would like others to behave.
2. Create flexibility, particularly for younger workers.
3. Offer guidance and encouragement, giving younger workers direct access to decision makers.
4. Remember the characteristics of the Nexus generation – the personal is public, global, mobile, fast – and satisfaction is key.

Organizations that have a healthy work-life approach find they need to recruit less often. If we believe that we need to work until the work is done, we'll never stop. Organizations, although restricted by some legislated deadlines, can change, control and set reasonable deadlines.

## Q&A: Discussion Period – Nora Spinks

The following are comments and insights that were raised during the discussion period:

- In order to balance the needs of the Nexus generation and provide customer service we must, with all stakeholders involved in negotiations, allow people to push back, creating healthy parameters. Whereas the Boomer generation is a proponent of “the customer is always right,” the Nexus generation feels that customers deserve excellent service and quality, but they are not always right.
- Nora shared the “How Are You?” test to determine how close to the edge one’s staff might be. As the question “How are you?” is one of social protocol, we tend to ask and answer it as if no one is really listening; replies, therefore, are often not masked and delivered from an honest place. The replies are based on a five-point scale:
  1. In degrees of wellness.
  2. In degrees of how busy one is (this is the first phase of chaos).
  3. In degrees of exhaustion, stress and burnout.
  4. “I’m not sure” – a sense of being disconnected from oneself.
  5. “OH, JUST FINE” – with sarcasm, hostility and anger, being past the saturation point.

It is important to recognize when staff are reaching the saturation point and put preventative measures in place as “presenteeism” is more dangerous than “absenteeism.” Presenteeism reflects employees who are emotionally not engaged and can potentially cause a ripple effect.

- The necessity and implementation of healthy work-life practices will be expedited by
  1. the demands for balance made by the Nexus generation,
  2. funders and foundations experiencing the same issues,
  3. societal perspectives.
- The Health and Safety Executive in England has implemented a Stress Code, whereby all employers must ask all employees a series of questions relating to workplace stress. Employers must reach certain thresholds or face penalties; success rates will be awarded incentives. This program is receiving attention in the E.U. and the ideas will spread to the U.S. and Canada.
- In dealing with contract or temporary employees and salaried positions it is necessary to match the various types of work available to the people. Managers require enormous awareness to “facilitate this sort of relationship building.”

- Although the Nexus generation has high compensation expectations, many trade-offs can be negotiated:
  1. Opportunities for personal and professional development.
  2. Opportunities for increased responsibility.
  3. Access to decision makers.
  4. Access to mentoring relationships.
  5. Flexible time arrangements.
  
- Where we came through the 1980s and 1990s working faster, harder and smarter, we now need to find ways to work “wiser, deeper and richer”; otherwise we will implode. This will require open dialogue with boards, funders and staff to identify and eliminate
  1. low-value work,
  2. low-impact initiatives,
  3. trade-offs made by all.

In closing, Nora shared this quote from Charles Darwin:

*“It is not the strongest species that will survive but  
that which has the greatest capacity to adapt.”*

She asked us to “think about your organization and what you are doing to adapt to the changing work environment.”

## Mentorship Strategy Discussion

Jean Malavoy and Sibyl Frei facilitated this session. Jean provided background information on the Creative Management Project (CMP) and introduced the goals and objectives of the *Draft Mentorship Strategy for Managers and Administrators of Cultural Organizations*. The following are the results (provided by Sibyl Frei of CMP) of the working session, designed to confirm the project's objectives, prioritize proposed activities and suggest who should take the lead on the selected priorities. After an opportunity to discuss the objectives and activities in small groups, one representative from each table briefly summarized the group's comments.

**Goal: The goal of the mentorship strategy is to increase support for and involvement in the mentorship of managers and administrators in the cultural sector across Canada.**

**Objective 1: To promote mentorship of cultural managers and administrators, and the mentorship strategy itself.**

The priority actions supported by the conference participants were the following:

- Advocating for a sustainable model for the funding of mentorships for managers in the cultural sector, including supporting longer-term relationships and developing more second-in-command positions.
- Strongly encouraging more funders of cultural organizations to include support for mentorship in their programming, and to broaden existing program criteria to include mentorship of mid-career and senior managers and longer-term mentoring relationships.
- Promoting mentorship as an important and achievable component of succession planning, and the development of healthy organizations and leaders in the sector, and encouraging more cultural organizations to support mentoring by their employees.
- Building a commitment within the sector for varied and flexible delivery of mentorship to meet diverse needs and address varied circumstances across the country.
- Continuing to build links with formal education, training institutions, internship deliverers and others offering professional development.

Other key points noted regarding objective 1 were these:

- The mentorship strategy needs to be long term – at least 10 years.
- The whole sector needs to recognize the importance of passing their experience on to the next generation, contributing to mentor development, and sharing information through mentoring.
- Funders need to follow the process of implementing the mentorship strategy, not lead it.
- Funders need to look at removing barriers to mentorship support, for example by allowing students in arts management courses to access

government internship and mentorship programs, or by extending support for publisher mentoring to other parts of the sector.

- Funding for mentorship should include developing models and tools for mentoring; developing and operating a national talent bank of mentors; recruitment, training and development of mentors and mentees; and time for project consultants to mentor organizational staff.
- Alternative mechanisms for mentorship funding could include establishing a funding collective, where some funders focus on short-term objectives and others focus on longer-term ones in the implementation of this mentorship strategy.
- Support for mentorship should not come out of existing operating funds for cultural organizations, especially given the many problems and issues faced by cultural organizations.

**Objective 2: To undertake research on issues related to mentoring of managers and administrators in the cultural sector, and develop effective mentorship training models and tools suitable to the cultural sector.**

The priority actions supported by the conference participants include the following:

- Models for mentorship training that reflect best practices, address critical success factors in mentoring relationships, and include strategies for integration with other forms of professional development.
- Sector-wide mentorship skills and training gaps, and mechanisms and priority-setting to fill those gaps, leading to the development of mentor competencies, selection criteria and compensation, and an understanding of the factors associated with motivation and rewards in mentoring relationships.
- Evaluation models for formal and informal mentorship programs.
- Mentorship training tools and templates.

Other key points noted regarding objective 2 were these:

- Learn models, best practices and tools for mentorship from other sectors, including from the for-profit sector. Some examples of successful models include CAPACOA's mentorship program, the Community Futures Development Corporation for its delivery in isolated communities, and the Association of Fundraising Professionals.
- Develop a range of models for implementing the mentorship strategy, including formal and informal, one-on-one, peer-to-peer, tri- or pyramid, group, and online mentoring. Note that peer mentoring is very important, particularly for younger workers.
- Best practices need to include the practical: what was done, what worked, and what didn't.
- Consider developing a barter system for mentoring between organizations, to offset lost staff time in the mentoring organization.

- Involve mentees in designing how mentors and mentees are matched in geographically or culturally isolated communities, including the development of an online community or mentorship support resource and database.
- Mentorship training should involve both mentors and mentees, and include identification and recruitment of mentors, criteria and processes for mentor and mentee selection, guidelines to avoid burning out mentors who are called upon often, how to structure a mentoring relationship, how to be a good mentor, how to clarify expectations on both sides from the beginning, how and what a mentor will learn, and how to make effective use of time.

**Objective 3: To support varied and flexible regional and local delivery of mentorship programming.**

The priority actions supported by the conference participants were the following:

- Establishing a very small secretariat to link mentorship efforts around the country and keep the momentum building for the mentorship strategy.
- Supporting the development of different delivery programs and approaches in regions and communities in accordance with the points outlined in the principles.
- Involving arts service organizations in facilitating linkages between mentors and mentees.
- Building a support network that accommodates mentors and mentees at all stages of their relationships.
- Allocating increased financial support for mentoring in geographically and culturally isolated communities to allow for matches from one region to another and ensure that some face-to-face time can be incorporated into those mentorship activities.

Other key points noted regarding objective 3 follow:

- Local and regional arts service organizations (ASOs) should take the lead on delivery, partnering with funders in their regions.
- Put funding and mentors in place, and then each community can identify the type of mentorship it needs; allow for a custom fit for each organization.
- Consider including international connections for mentorship relationships.
- Mentorship should include individuals in one organization being mentored by individuals in another, and mentorship for artist-run organizations.
- Delivery could include national and regional networks, in-person roundtables to help people find mentors, initial meetings for forming mentorship pairs, dialogue forums about arts management issues, and face-to-face and online mentorship follow-up.
- Many suggestions about where the secretariat should be housed were made: CCA only, CHRC only, a joint initiative of CCA and CHRC, HRSDC, Canada Council and Charity Village.
- Leadership of the secretariat should be a panel or advisory body, representing diverse disciplines, organizations, communities and cultures to

build buy-in at the national level, and should include organizations not funded by the Canada Council.

- Secretariat should include multi-generational staff and contract people who come from different backgrounds, viewpoints and geographical regions.

**Objective 4: To provide national coordination, communication and information-sharing.**

The priority actions supported by the conference participants were the following:

- Coordinating activities in support of varied and flexible regional and local delivery of mentorship programming.
- Facilitating the matching of mentors and mentees, especially in geographically or culturally isolated communities.
- Reaching out to the large pool of potential mentors in the cultural sector who are not actively involved in mentoring at present, and other potential mentors in other parts of the non-profit sector and from other sectors.
- Supporting the development of training models, resource materials and tools, the provision of training in mentoring as needed, and evaluation.
- Supporting the development of online coordination, technologies and mentoring communities, and, in the process, developing a searchable database of questions and answers available to others.

Other key points noted regarding objective 4 were these:

- In addition to more traditional face-to-face mentoring relationships, develop online mechanisms to allow mentors and mentees to connect and learn. Use e-mail and online communication tools to coordinate delivery, share resources, connect mentors and mentees. Look at establishing lunch-time forums where administrators can sign in online and chat at a specific time each week.
- Develop electronic tools that are accessible via the Internet, including a national database of mentors, and the kinds of projects, organizations, and skills they've been involved in, a database of what worked and what didn't, so there is a Web resource for people to look for information rather than having to ask their mentor, and a database of useful tools for mentoring. These tools should be able to be adapted by large and small organizations.

**General Comments:**

- Add a definition of mentorship to the strategy, so that everyone understands what the strategy is trying to promote.
- Addressing regional, organizational and cultural issues should be part of the context for mentorship in the Canadian cultural sector.

**Lessons Learned from the Cultural Sector**

- Mentorship needs to occur over time, not in a three-day visit.

- It is important to build recognition that mentorship is a two-way process in which both parties gain, and that mentorship does not involve only younger people learning from older people.
- Personality matching is very important; matching on paper does not necessarily work.
- Mentors need to be sensitive to the needs of the organizations with which they work.
- Mentoring relationships need some contact every week (e-mails, phone calls ... small amounts of time).

## **Challenges in Professional Development**

This session was hosted by Bob Johnston and Susan Cohen of the Cultural Careers Council of Ontario (CCCO). Bob began by introducing the CCCO mandate and activities relating to career accessibility and advancement for culture workers in Ontario, highlighting in-career professional development and on-the-job training as priorities by means of AIM (Apprenticeship, Internship and Mentorship).

In discussing professional development, one must look to the work of the Creative Management Project, which led to discussions at the Chalmers Conferences in 2002 and 2003 and which were dominated by human resource issues. We are seeking practical solutions to advance the subject of career development in the cultural sector.

The following are some of the suggestions made at the 2002 Chalmers conference:

- a. By Marie Lalonde:
  - Remain flexible in managing employees (flexible hours, respect for home and family life).
  - Initiate internships across the country and abroad to expand knowledge.
  - Encourage exchanges between large and small institutions within a community.
  - Introduce programs to improve employee morale and creativity.
  - Ensure arts management courses respond more directly to the needs of the sector.

- b. By Jocelyn Harvey (these are suggestions she had gathered in her research):
- Having a younger manager shadow a senior manager for the cycle of the organization's work, following which the senior manager would take a sabbatical, leaving the younger one in place.
  - "Sanity circles" where managers gather to provide support and peer-to-peer networking opportunities, as well as professional development seminars.
  - With funding, place assistants to cultural managers of arts organizations for career mentoring. This was done in Quebec and most led to permanent positions.
  - Have a senior manager nearing retirement pair with a young manager, working together over the period with the senior manager passing on skills and expertise. As the senior manager starts to bow out of the organization, the younger one assumes more and more responsibility for the job.
  - Funding agencies should ask organizations to table human resources plans, as approved by their boards, indicating how they are planning for succession and investing in staff professional development.
- c. A general conclusion:
- Internships are restricted in length and criteria.

The 2003 Chalmers Conference identified three obstacles in the cultural management crisis: time, money and attitudes. In order to address the issue of attitudes, we need to make professional development a priority "in the battle for resources to produce artistic work." Eighteen recommendations were made in the 2003 CMP report, many of which have already been acted on:

- a. Human Resource Management Tool Kits created by CCCO and Cultural Human Resource Council (CHRC).
- b. Action on mentoring by CCA and CHRC.
- c. More emphasis on HR by funding agencies.
- d. Publication and dissemination of CHRC's *National Compensation Survey* and *Building on Success*.

Bob introduced Susan Cohen to discuss recent CCCO work relating to training needs and resources in Ontario's cultural sector. Susan identified several challenges in dealing with professional development:

- a. As freelance workers, many cultural workers are ineligible for public funding for training, putting increased pressure on trade or arts service organizations to assist.
- b. Information is unevenly distributed.

- c. Diversity of the sector and individualized nature of cultural careers makes it difficult to standardize professional development and training.
- d. In prizing artistic and creative skills, we sometimes don't focus on other areas also requiring development.
- e. We need to retain the Nexus generation in the cultural workplace.

The CCCO developed Career Initiatives in Culture, a large-scale capacity-building program, funded by CHRC, which ran three times. "The programs were intended to strengthen the cultural sector's capacity to address skill development for professionals. The various projects promoted better resources in the community through improved information, materials and tools or networking." Concerned about the long-term effectiveness of this program, the CCCO, in 2002, examined the results and discovered duplication of projects and information, lack of access to existing data, and a lack of coordination relating addressing the issues of and funding for professional development.

The CCCO then embarked on a research program to analyze professional development from a practical perspective, asking "What information and skills do professionals working in culture need and where can you acquire them?" The first phase of this project was commissioned by the Ministry of Culture; the result will be a study to be published in the near future. The following are highlights from the report:

- Definition of ten skill areas for cultural workers.
- Enumeration of specific skills for the ten skill areas.
- Development of list of possible learning formats:
  - a. Short courses (1.5 days).
  - b. E-learning of various kinds.
  - c. Experiential programs (coaching and AIM).
  - d. Customized training opportunities.
- A survey to identify ranking of particular skills necessary for training and best learning formats.
- Areas identified as having the greatest need for professional development are leadership, career planning, using volunteers effectively, and personal negotiating. Availability and accessibility to these four areas is considered problematic.
- Learning formats that include networking and experiential experience were identified as the most beneficial.
- The next phase of this research has been supported by the Ministry of Training, Colleges and Universities, to consider skills in more detail.

The study should result in a consolidated resource of the following:

- The skills identified by Ontario's cultural workers as being the highest priorities for professional development.

- Where the skills can be attained, in the appropriate formats for individual circumstances.
- Identified gaps and solutions for those gaps.
- Plans of how best to work with our existing information and professional development network – ASOs, unions, government agencies and others – ensuring that information is distributed as evenly as possible provincially and throughout the sub-sectors.

Bob Johnston closed the session by recognizing that although there is great value in the work that has been done to date, there is still a great deal more to be done. Although most would agree that more financial support to better pay human resources will help to address a crisis in the industry, we all know that the money is not coming fast. In advocating that there are other solutions, Bob suggests that we can better invest in human resources with confident leadership delegating and allowing staff to take chances and make mistakes, while sharing experience and knowledge. Leaders need to maintain and improve their skills in order to be able to allow for successorship.

In answer to his question “What can we do?” Bob identified the following options:

- Ministry of Training, Colleges and Universities: although there are no apprenticeships dedicated to the cultural sector, there are signs of more flexible approaches; a wage subsidy approach would be beneficial in the not-for-profit sector.
- Setting aside a small percentage of our annual budget for professional development of all staff.
- Encouraging the trend that arts funding agencies are building HR management concerns into their funding criteria.
- Lobbying HRSDC to revise internship funding criteria to be more suited to the realities of the cultural sector.
- CCCO’s dream: to develop an arm’s length fund dedicated to training and in-career professional development in the cultural sector.

## **Q&A – Challenges in Professional Development**

During the discussion period, the following comments and insights were shared:

- The arts industry is resilient. Its members may migrate to other sectors, but often return. When labour force numbers are dropping in other sectors, they are stable or rising in the arts.

- The need for both hard (information-based) and soft (emotional, relationship-based) knowledge is common to all generations, although each generation may approach them differently. The challenge lies in how we build strategies to deal with these two different types of knowledge. Although there is a distinction between them, they are not in conflict.
- Although there are programs and services that encourage multiculturalism and provide funding for diverse cultures, the question of how culturally diverse artists can be integrated to one Canadian culture still remains unanswered

## **Plenary Sessions – Monday, February 7, 2005**

### **Recap of Peer Breakout Sessions**

Having met with the peer breakout session leaders following their sessions on Sunday afternoon, Mary Rowe synthesized their comments into the following highlights (specific peer breakout session reports are available in the Breakout Session segment of the report.)

- Relationships are what keep people in the arts sector. More formal terms for relationships include mentorship and leadership development.
- Both mentors and mentees must be responsible for defining their relationship.
- On the subject of credentialing or accreditation, there was debate on whether the profession should seek some form of accreditation. The argument for is that it would add legitimacy and the argument against is that it would introduce an inflexibility.

*“Some form of credentialing would be a means of setting some work-life balance standards.”*

- Boards of Directors need to take more responsibility and leadership for human resource issues, particularly succession planning.
- Flexibility of work style is essential as an increasing number of future jobs in the sector will be of a non-institutional nature. Encouraging flexible working conditions will assist in making allowances for this transition.

- Unlike many other sectors, the arts sector seems to not provide rewards for its long surviving members. The question of whether we need to institute an intentional reward system was raised. Regarding models: are there elders who have thrived and what are their lessons and what can we learn from other sectors?

## Andrew Taylor's Speech

### "Managing Metaphors"

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All keynotes are supposed to begin with a joke, so here is mine. Forgive me if you've heard it before, but it has a larger purpose that we'll get to soon:

Sherlock Holmes and Doctor Watson are out in the woods on a camping trip (as was so common in their time). In the middle of the night, Sherlock Holmes shakes Doctor Watson awake and says to him, "Watson, look up at the sky and tell me what you deduce." So Watson rubs his eyes and looks up at the night sky, saying: "I see a billion stars, among which there may be a million planets, among which there may be planets much like our Earth, and upon which there may well be sentient life looking back at *their* night sky at this very moment, wondering if *we* might exist." After this speech, Sherlock Holmes pauses for a moment and responds, "No, Watson, you idiot. Someone has stolen our tent."

I love that particular joke for many reasons – for one, it makes me laugh. For another, it has the rhythm and structure of so many great jokes, lulling us into one perspective of the world and then snapping us into another. It's a miniature version of what pundits call a "paradigm shift," a phrase I happen to hate but feel compelled to use, if perhaps by the common laws of conference keynotes. For this morning, I also think the joke captures a key idea that may help us in the topic we're here to talk about: conceptual regeneration, professional renewal, and the healthy arts leader.

I'm going to suggest today that, like Doctor Watson in that joke, our impulse when faced with these and many similar challenges is to focus our weary eyes on the wrong scale. In our case, however, we focus on the tent – tactical responses and procedural adjustments. We hunger for tips, tricks, best practices, new business models, funding initiatives and other adjustments. We hope that these tactical responses might make our work lives less stressful, our workday less jumbled, and our organizations healthier. But by indulging this impulse, we may be missing a more productive scale for exploration. Worse, we may be reinforcing and entrenching the very problems we hope to solve. What if, instead of shuffling the symptoms and the cures, we began to discuss and discover the *cause* of what we're struggling with?

To me, that cause is on a scale at once more massive and more intensely personal. That cause lies deeply embedded in the metaphors we manage by, and in the mental models that drive our interactions with the world.

Arts and cultural managers are in the *business* of metaphor, symbol, narrative, and meaning. Why not engage more of that capacity in exploring the ways we describe and understand what we do?

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But first a confession: I'm a huge fan of tips, tricks, tactics and techniques. To me, visiting an office supply superstore is like a pilgrimage to Mecca...so many gadgets and systems and software solutions designed to streamline my professional life. Surely here, I think every time, are the answers to my cluttered desk, my missed appointments, my relentless deadlines. So, I buy some bundle of things and bring them home. I eagerly unwrap them and place them around my workspace. And then, I almost instantly go back to working as I always have...with just a bit more clutter of unused filing apparatus crowding my personal space. My desk is the place that office products go to die. Worse yet, those icons of efficiency eventually seem to glare at me as I work, a constant judgmental reminder of the ways I *should* be working, but can't bring myself to do.

At most professional training sessions and conferences, the experience for me is much the same. They are so gloriously jam-packed with tips, and tricks, and lists of the six steps you've got to follow to do something or other, and the five trends that you absolutely have to track in your line of work. E-mail marketing. Web development. Relationship building. Grant writing. Planned giving. Wonderful stuff. Thoughtfully presented. Earnestly received. But all too soon, they become little dust-bunnies in my brain or illegible scrawls in the conference notes I never look at again. And as with the office supply gadgets, the wonderful insights and energy of professional training can eventually come back to haunt me...more stuff I could and should be doing if I were smarter, or better, or more organized,

or had more time or money. I leave these conferences elated and full of potential, but quickly become exhausted and full of self-doubt.

In my own work, this challenge isn't just a personal issue, but a core concern. As the director of an MBA degree program in Arts Administration, it's my *job* to select the things that future leaders need to know. My graduates are supposed to be ready to manage effective, sustainable, and dynamic organizations or initiatives, not just in the world that was, but in a world that's continually emerging. With the standard tools of academia, I'm supposed to sketch out the path to get them there (fortunately, I have lots of insanely intelligent help, and I'm blessed with brilliant students). But as I assemble my various syllabi every year, there seem to be more and more things that an effective manager *has* to know. Okay, I say, we're covering marketing, human resources, operations, financial accounting, finance, non-profit industry structure, negotiation, education, outreach, fundraising in all of its forms...but boy, we really need international exchange, cultural policy, copyright, contract law, advocacy, technology, and on and on and on. The impulse is to counter complexity with complexity, adding more and more stuff to the curriculum in an effort to stem the tide. But that complexity comes at a great price. It can lead to students with a full tool kit, but with little contextual understanding of when each tool is most appropriate. It can lead them to burn out before they begin, once they see the sheer scope and scale of the challenges they will face as working managers.

At the same time, I'm writing this fairly-daily weblog on the business of arts and culture on ArtsJournal.com. To be honest, I do this almost entirely for my own benefit...my morning mental calisthenics. Plus, the deadline and the public posting force me to actually do what I encourage in others: to find at least one interesting article, issue, or conversation going on in the world each day and try to give it some context or connection. It's a happy accident that anyone actually reads the thing. But I'm pleased and humbled that they do.

Through the course of the 18 months I've been writing this weblog – some 299 entries by my last count – I've seen an eerie mirror out in the wider world of my own struggle. More and more stuff to know, more trends, more tips, more tricks, more challenges. More articles about "shifting landscapes" and "paradigm shifts" (there, I've said it twice now, two points for me), and the tactical responses they require. More events and symposia on "change management" and "capacity building" – without anyone defining either "change" or "capacity." And somewhere in there is the feeling that despite our best efforts, the problems are getting larger and more complex, running away from us just as quickly as we can chase them.

There's a pattern here that might be obvious and familiar to many of you. When faced with a complex problem, we counter with a well-meaning and reasoned

response, only to find the problem made worse by our interventions. The response to office clutter can lead to *more* office clutter. The process of professional training and renewal can leave us *less* responsive and confident. The policies intended to force a new connection between arts organization and community just leave them *more* disconnected, but in different ways.

This pattern, and the fact that it shows up in so many places, suggests that error in scale that I talked about at the beginning. Perhaps as we've been straining toward the night sky for an answer, the real opportunity has been right in front of us. Which, forgive me, brings me to another joke<sup>1</sup>:

Two villagers decide to go bird hunting. They pack their guns and set out, with their dog, into the fields. Near evening, with no success at all, one says to the other, "We must be doing something wrong." His friend nods his head, and says, "You're right. Perhaps we're not throwing the dog high enough."

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Let's put down the dog, and take a breath.

To get to where I'm going, we need one more slight detour. And that's to suggest that we all interact with the world not directly, but through mental models, or through metaphor. It seems too obvious to say, but we can't hold the world in our head. We can only interact with the world, and slowly build a sense of how it reacts to our actions. If you've ever watched an infant or toddler play with a new toy or confront a new challenge, you know what I mean: a burst of experimentation, of play, of trial and error, that slowly becomes a nuanced engagement with the thing...not just then, but at every future interaction.

We never stop building, refining, and rebuilding such models. We just become so exceptional at it that the process becomes invisible to us. We don't have fire in our head, but we know that if we touch it, it will burn. We don't have the mechanics of a doorknob in our head, but we have a fairly nuanced model of how to engage a doorknob to make something useful happen. In fact, we have multiple door-opening-device models in our head ready to engage the knob, or the push bar, or the handle, or the motion sensor.

These mental models are invariably shorthand. They don't require all the details, just a selection of essential elements. We usually adjust them as we confront unexpected responses or new configurations – think of your first experience with one of those touchless sinks in the restroom. But they are shorthand. They are

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<sup>1</sup> This one swiped from Marvin Minsky, "Jokes and the Logic of the Cognitive Unconscious," which isn't particularly hilarious otherwise. It's available on-line at <http://web.media.mit.edu/~minsky/papers/jokes.cognitive.txt>

abstractions. They are incomplete. They have to be, or else we'd get nothing done.

While we use these models and metaphors quite successfully for simple systems with immediate feedback, we use the same techniques for modelling complex interactions with the world. For example, the human brain turns out to be exceptionally powerful at reading other people's expressions and modelling other people's minds. There are fascinating studies that show that our efforts to model what *other* people might be thinking also starts very early on in life...somewhere between three and four years old for most of us.<sup>2</sup>

This, too, we forget that we're doing until we're horribly wrong – when we misinterpret someone's feelings and get smacked in the face, when we are surprised by a specific response, when we tell a joke that's wrong for the room, or when we meet people who grew up in other cultures.

So, we model our environment. We model other people's minds. And we also model larger systems like social groups, organizations, ethnic groups, demographic groups, environmental systems, and everything else. Just listen closely to any political debate and you will hear two versions of the world slamming against each other, or more often breezing by each other.

So why on earth am I telling a room full of arts and cultural managers that humans interact with the world through metaphor? Metaphor is what we do. We're constantly telling the world about art's ability to change lives, shift perspectives, build empathy, voice alternative views, and question our collective assumptions about the world. And for many in the room, right now, this may be really old news. Duh.

I'm walking us through this idea because it's clear in many situations that we *don't* as managers, as funders, as artists, apply the same creative eye to the metaphors that drive our management practice, and our search for leadership responses.

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<sup>2</sup> One particularly interesting experiment involved showing a child a candy box, but then also showing them that inside was a pencil, and not candy. The child was then told that someone was going to be coming into the room, and asked what *that person* would say was in the box. Children under four usually believed the new person would expect a pencil. Children four and over had the capacity to separate the other perspective from their own, and say that the new person would expect the box to contain candy. To join in the fun, read J. Perner, S.R. Leekam, and H. Wimmer. (1987). "Three-year-olds' difficulty with false belief." *British Journal of Developmental Psychology*, 5, 125–137.

As examples, let's pull out just a few of our collective metaphors about arts and cultural management and take them for a spin. If I'm right, then the change of scale might inform our other conversations, and break a few logjams in our thoughts about what to do next. Let's begin with a big one:

### *Production and Consumption*

When arts managers talk about what we do, our language is infused with the metaphors of production and consumption. We produce theater, present performing arts, mount an exhibition, or launch a program. We do outreach and education. We collect and preserve – much like warehousing. And when we're done, we expose our work to an audience.

On the consuming side is the audience or the community. They come in to see our completed work and react to it. They consume it, not by *actually* consuming it (unless it's food art), but by receiving it or observing it. We have marketing departments and marketing plans. We have a marketing budget, so we must be selling something.

I'm being a bit crass here, but I hope you see the point.

As another example, in the United States, there's a bubbling conversation among arts funders about supply and demand. Many of them believe that they've focused for the past decades on supporting the supply of the arts in America. Perhaps now it is time to shift focus to the demand. There's an imbalance, they have determined, and it needs to be adjusted. Supply and demand is another form of production and consumption. And it's a metaphor we seem to take as reality.

So, what's wrong with that? It seems a useful metaphor in many ways to talk about supply and demand, production and consumption, giving and receiving. All of you know the energy and stamina it takes to arrive at opening night. It *feels* like production. And you *are* producing something. Where's the danger in it?

The danger is that this is a metaphor, a model. It's not reality, it's a convenient abstraction that helps us make decisions and do our work. Our metaphors also define the worldview in which we search for solutions, responses, and reactions. And if we're stuck in a particular metaphor, we are also often blinded to the full range of options in front of us.

There's an old consultant's saying (said by old consultants everywhere):

If you only have a hammer, every problem looks like a nail.

So, if you only have production and consumption, every problem looks like a market imbalance, or a marketing problem, or a disconnect.

Further, consider the funders who are turning their efforts from demand to supply. If the accepted metaphor is fundamentally flawed, might they just be reinforcing the problem they're trying to solve? Or at the least, might they get no results, or results that surprise them in unpleasant ways?

The true test of a metaphor is to find another option that works equally well or better. Let's unbundle this a bit to see where it takes us: Think for a moment about a meaningful experience you've had as an audience member or observer of a creative work – a theater work, musical performance, sculpture, painting, whatever. By "meaningful" I mean all the usual stuff – transfixing, transformative, a sense of losing time and space perhaps, of being "in the moment." Stick with an audience moment for now, a consumer moment. Do you have something in your head? I'll give you a minute to find it.

Now, a question: who produced that moment? There was certainly a production involved; you were sharing space with it in a theater, a museum, a gallery, a city street, or someplace else. But who produced the moment? Your reaction to the creative expression was likely fuelled by something inside you – a memory, an emotion that was waiting to be expressed, a resonance that perhaps you can't even define or don't care to, a love or knowledge of the art form or the art work. You *brought* something to that moment. The art brought something too.

Now, if you can, recall a moment when you created something, or expressed something to someone else or to an audience. There is likely a moment or two where you felt a similar sense of connection in time and space, when you were "in the zone." We talk about this more often in the performing arts, but there is a tangible quality to an audience and how it reacts during a performance. There's an invisible give and take that draws something exceptional out of the artist, and leads them to a similarly powerful place.

At this moment for the artist, who's producing? Who's consuming? Who supplied? Who demanded? I'm suggesting here that both experiences are co-constructions, not produced and consumed but generated as two or more sides spinning seamlessly together. It seems a minor point but it makes a major difference in how we manage, lead and spend our energies.

And here I'm not just talking about what we call the "lively arts," or the art forms that bring artist and audience together in time and space. There's a similar feeling to visual and plastic arts in many cases, with a synergy between the construction of the work in the studio and the deconstruction/reconstruction of

the individual experiencing the work. Despite the separation of place and time, the blurring of production and consumption is still just as relevant.

I'm sure I'm belaboring the point, but it's worth belaboring. Production and consumption of creative experience is a useful metaphor in many cases. But it's an abstraction, like everything else. When we ignore the other metaphors we might bring to bear, or accept our current metaphors as fact, we limit our vision, our insight, our options, and our choices as managers of the process.

But before we move on to another metaphor worth challenging, I'd like to extend this one a bit further. We have already talked about the intense creative experience as a co-production of sender and receiver, or artist and audience. They both have to be there, be engaged, and be ready for it in some personal way. But this artist/audience connection is only one of the many moments we have the privilege to broker or enable. And we can be thoughtful as managers as we consider where the weight of the moment might live.

For a professional performance, for example, we might focus our energy on the audience, and consider how they might find connection to what's on stage, how we can play a small role in supporting them, encouraging them, or giving them space to find their connection on their terms. In a community or amateur performance, our role as managers might be more focused on the performers, ensuring *their* experience has the greatest potential and space for meaning. For craft circles or heritage organizations, the experience might come in the learning of a handicraft or cultural ritual by many individuals.

There are management and leadership choices embedded deeply in how we define what we do, and what we hope to accomplish. We can choose the metaphor that suits us, rather than letting it choose us.

For example, a colleague of mine took a leadership position at a youth choir with a strong reputation for excellence, and a highly regarded quality in their public performances. The board of this organization expressed great pride in the group's public performances, and judged their success by the quality of the venue in which the children performed, and the level of artistic excellence they achieved in that environment.

But as they slowly noticed a decline in enrolments and a drop in interest, they were bold enough to question the metaphors that drove both their measures of success and their strategic plans. Through a long process, they slowly came to discover that what was truly important to them was engaging young people in the experience of intense discovery of musical performance, and a social exploration of the craft of singing. In this metaphor, a performance of the highest quality possible was still essential, but rather than a goal, it was a *tool* to

reinforce their true purpose. A professional-quality performance was an important capstone and incentive, adding intensity and purpose to the rehearsal process. But it was no longer the center of the story.

When you challenge and inform your metaphors, you manage differently, you lead differently, and you measure differently. And that seems useful to me.

Okay, now a few variations on the theme:

Consider a donor at the announcement of a major gift (and here I mean “major” to *them*). These moments are often filled with emotion, with stories of their family history, their community bond, their life experience. They are expressing a vision of who they are, who they hope to be, what they want for their families and communities, and how they long to be remembered. Who’s giving at that moment, and who’s receiving? Who’s thanking whom?

Or consider the complex relationship between mentor and protégé. We are quick to believe that one teaches and one receives wisdom, but from exploring our own experiences we can quickly see how the learning is a co-construction or a co-production, as well.

In short, the production and consumption metaphor is everywhere we look, or rather, everywhere we *don’t* look. And it’s worth a moment of our time.

Now let’s take on another metaphor, though nothing quite so grandiose:

#### *The Fiscal Year*

We all know the rhythm of our fiscal year, or our season. It’s a necessary time frame for so many things – from financial reporting to grant cycles to tax documentation. But it too can become for us a gold standard for how we manage and measure our work. If we’re not careful, we can begin to think it’s the appropriate frame for everything we do.

Think back to any of those meaningful moments you considered before: You in the audience; you on the stage or in the gallery or in some other creative space. What sort of time frame was required for that moment? Was it a calendar year? Was it an hour and a half? Or perhaps, was it a lifetime, or even two lifetimes: Your life to that point and the artist’s, or yours and at least one audience member.

Of course, there are multiple rhythms and cycles to what we do. As managers and leaders, we must always work to recognize them and guide our organizations accordingly.

The great philosopher John Dewey explored these rhythms of creative experience more than seventy years ago in the speeches that became the classic book, *Art as Experience*. He had a glorious and brain-bending way of exploring the nature of the creative moment, and of questioning what still today are our fairly rigid metaphors for artistic expression and experience.

In one passage, he describes a flash of lightning illuminating a dark landscape. In that moment, we have a sudden view of the objects and we recognize them. But, he says:

...the recognition is not itself a mere point in time. It is the focal culmination of long, slow processes of maturation....It is as meaningless in isolation as would be the drama of Hamlet were it confined to a single line or word with no context.

If I didn't know the objects illuminated in the landscape, that lightning flash would carry little meaning for me. File *that* somewhere in your fiscal year.

Of course, I'm preaching to the choir here. We all know that the creative moment is not a moment at all, but a flashpoint in the full experiences of the audience, the artist, the donor, the volunteer, the staff member, the board member. We can all stretch our metaphors to make room for multiple cycles in our work, multiple rhythms in our days.

But some metaphors are so persistent, so insistent, that they crowd out the other possibilities. The fiscal year is a particularly brutal abstraction. It requires continual energy to hold it only where it's useful to you and to your organization. By what time scale do you choose what to do, how to do it, and how to measure your success?

### *Partnership*

Do we dare? I think we do. Partnership is a wonderful word. It is the stuff of conferences and constant conversation. We need more of them. They must be built. They must be fed. They must be extended and enhanced.

The dictionary tells us that partnership is "a relationship between individuals or groups that is characterized by mutual cooperation and responsibility, as for the achievement of a specified goal."

As I said, it's a glorious metaphor, but it's a metaphor nonetheless. When we approach it without question, we can simply reinforce the problems we are seeking to solve through its use.

How so? The metaphor of “partnership” carries with it the assumption of separation. The word, itself, is from a Middle English root meaning “portion, part, or division.” So, by seeking a partnership, you are accepting and reinforcing the idea that you and your partner are separate, that the lines between you can be reasonably drawn. And because you actively “form” such a thing, you also bundle the assumption that without your agreement, the organizations or individuals involved wouldn’t be influencing each other’s choices or options or lives.

Of course, that’s nuts.

For one thing, we are all inextricably interconnected in startlingly practical ways...by our markets, our geography, our leadership, sometimes even our board members, by the common communities we serve, and by the various revenue streams we draw upon.

For another thing, consider that meaningful moment once more. How many other arts organizations or public or private institutions or individuals played a part in that connection between artist and audience? My transfixed moment in a symphony hall may carry with it the church music I heard as a child, the muscle memory of my high school French horn lessons, the connection I feel for a family member through our mutual love for the piece, the power of sharing that sound with my wife beside me. The symphony may have been the lightning in the field, but I was prepared for that flash by a thousand connections that came before.

The term and the metaphor of partnership can often blind us to the connections that already exist, that bind all of our choices and options to our peer institutions in the arts, our schools, our communities, our governments, and our disciplines. So often, instead of “forming” something, we are really just recognizing a connection that already exists between organizations, and informing it with conversation and thought. We are making the implicit connection explicit, and adding intention to the mix.

But in many places, we’re starting to come around. Just last week, there was a report released by the United Kingdom’s Department for Culture, Media, and Sport on the future of museums.<sup>3</sup> In part, it discussed the challenge of access for all the great art and artifacts scattered around the country, with so many in storage by London’s major museums. The report framed the question in a rather extraordinary way:

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[www.culture.gov.uk/global/consultations/2005+current+consultations/museums\\_21st\\_century.htm](http://www.culture.gov.uk/global/consultations/2005+current+consultations/museums_21st_century.htm)

...museums' collections and acquisitions, while remaining in the direct ownership of individual institutions, could also be viewed as contributing to the nation's "public collection" as a single resource under the custodianship of many individual museums.

So, although the museums are separate institutions, their collections can be considered part of a single public trust. They are separated in space and governance, but stewarding a common pool. We could also say the same of the creative moments of connection we keep talking about. "Partnership" isn't a particularly useful metaphor here, and perhaps even clouds a different truth.

Before I move on to the home stretch (and trust me, it's coming), let me just fling out a few more metaphors to watch for as our conversations continue today and beyond:

#### *"Like a Business"*

Okay, it's a simile, not a metaphor. But it's silly, nonetheless. In fact, it's silly *because* it's a simile. Arts organizations *are* businesses...collections of people and contracts and capacities and assets. Anything they do is "like a business." And even if they weren't businesses, what *other* business are we supposed to be like? Enron? Halliburton? Usually, this phrase is a placeholder for more specific behaviors like accountability, responsibility and sustainability.

If that's what we mean, let's just say it.

#### *Emerging Leaders*

Sorry, I couldn't resist given our conversations yesterday. It's a wonderful and nurturing sentiment, but a complicated metaphor when we start to spin it out. The implied evolution for people in this group would be "leaders who have emerged," and that's just odd. The best leaders I know at any level of an organization are *constantly* emerging. As someone said yesterday: you're done when you're dead.

I haven't yet come up with an alternative metaphor, so for now let me suggest a slight simplification:

#### Leaders

We could honestly extend this exercise for days at a time, but I think you get the gist. And some of you are likely sick of it. Consider this a party game at your next staff meeting: pick a commonly held metaphor for what you do, and deconstruct it. It's particularly useful for problems or challenges that continue to return or get worse despite your tactical efforts and best intentions. When you flex the metaphors a bit, another option is likely to drop into your head.

So, you may well be asking, apart from tearing down long-held and even comforting beliefs, leading us to question everything we do, and making us nauseous or anxious or just plain mad, is there any *positive* outcome of this different scale of thinking?

Thank goodness, yes. And let me end with it. What we're beginning to do in our MBA degree program in Arts Administration, and elsewhere, is to consider how we can call forward these metaphors to our advantage. How can we add metaphor, itself, to our tool kit as managers and leaders in the arts? As we do so, can we respond to the complexity of our work and our world by teaching *less* rather than more? Could there be patterns of knowledge or awareness that reunite the many disconnected things we do with our days?

I'll admit that our first steps are horribly clumsy, and inevitably wrong, but I believe there's something there. Consider, for example, these two questions.

How might you model these in your mind? How do individuals and groups attach value to a lived experience? And how to they express that value in money or time or attention?

In those two questions lie marketing, development, outreach, education, architecture or environment, volunteerism, and even experience design. If we can learn to more effectively observe, infer, inquire, and model these processes, we can translate them in a thousand different ways in service to the creative moment and to the particular form of expression we hope to support.

There's finally emerging research in the arts that's cutting to this particular core. The Connecticut Commission on Culture and Tourism just released a report in July, exploring how and why people value arts experiences – in their own words, on their own time.<sup>4</sup>

And beyond specific research in the arts, a more broadly framed question can lead to direct connections with other disciplines of study – from psychology to social science to urban studies to neuroscience. There are people already studying how people use the built environment, how cities form and evolve, how individuals construct meaning and purpose. We can learn from them if we frame our questions well.

And I'll admit that even the tearing down of persistent metaphors can lead to positive results. Consider the production/consumption metaphor, and the alternative of a co-production. The latter suggests that the entire organization

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<sup>4</sup> Available at <http://www.ctarts.org/Public.htm>

has a meaningful role to play in the core purpose of the organization. It's not a production and creative team creating something to be sold and supported by marketing and development. It's a co-production that requires all of them, as well as front-of-house or audience services, facility management, custodial staff, ushers and volunteers, and the audience themselves.

And to me, at least, the idea of a co-constructed experience offers a healthy shift in defining what we do. In all of our efforts, we can only ever provide half of that moment. It's not a gesture of force, or of completion, or delivery, but an invitation, an open hand. It's a posture that's much more compelling and attractive, I believe, to the future leaders we're aching to attract. And it might make our lives a touch more sane.

I'll close with a quote from Jacques Lusseyran, the French resistance leader from World War II who so vividly describes his discovery of the world despite his blindness. To me it captures both the glorious world that's available to us if we are willing to expand and explore the metaphors we live by. And it speaks to the nature of the creative moment of connection, and the part we play as arts managers within it. He says:

If I put my hand on the table without pressing it, I knew the table was there but knew nothing about it. To find out, my fingers had to bear down, and the amazing thing is that the pressure was answered by the table at once. Being blind I thought I should have to go out to meet things, but I found that they came to meet me instead. I have never had to go more than halfway, and the universe became the accomplice of all my wishes.<sup>5</sup>

May we all discover our world in this way. And may the universe be the accomplice of all of your work. Thank you for your attention and your time.

*This line of thinking is a constant work in progress.*

*Feedback and comments are gratefully received:*

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<sup>5</sup> Jacques Lusseyran, *And There Was Light: Autobiography of Jacques Lusseyran, Blind Hero of the French Resistance*.

## Q&A – Andrew Taylor

The following comments and insights were shared after Andrew's speech:

- In response to a question about the challenges inherent in working with and for a changing multicultural population, Andrew suggested that the answers and tools are often already within us. We must work to translate the answers to funders and other stakeholders
- The metaphor "audience development" is one that suggests we think the audience needs to be developed and we must not assume this. Many people enjoy the arts for reasons other than "development" and don't need or want to understand the art's form in order to appreciate it. In order to avoid a metaphor driving people away from us we must ask what we want to achieve and ensure that we mean what we say.
- The issue of the arts sector being forced into the business model and causing a split vision led Andrew to suggest that "it always takes a large community to make a metaphor.... We stepped into this trap ourselves." We can behave like a business, because we are a business; but we can and should participate in different metaphors depending on their use to us at any given time.

*"All models are wrong. Some models are useful."*  
attributed to George E. P. Box<sup>6</sup>

- Many organizations struggle with their marketing materials, realizing that they don't necessarily reflect what the patron is buying, or reflect the values, meaning and connection they are trying to create. The audience has many reasons and needs for their participation. The Clarice Smith Performing Arts Centre at Maryland was cited as incorporating their values in their marketing; see <http://claricesmithcenter.umd.edu/website/c/home>.

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<sup>6</sup> This quote is often attributed to W. E. Deming.

## Succession Planning Panel

Pat Bradley, OAC's Theatre Officer and Research Manager, introduced the Succession Planning panel session and thanked the Young Managers' Roundtable Committee for their work and insight in planning the session. The session was facilitated by Jonathon Knapp of the Thunder Bay Symphony Orchestra, who was a member of the Young Managers' Roundtable.

Jonathon introduced the panelists: Yvette Nolan, Artistic Director of Native Earth Performing Arts; Kim Tomczak, Executive Director of V tape; William Lau, Artistic Director of Little Pear Garden; and Kathleen Sharpe, Director of the Ontario Cultural Attractions Fund. Each panelist was invited to introduce his or her organization and recount his or her experience with succession planning.

**Yvette Nolan** recounted her "anti-succession story" at Native Earth. Prior to Yvette's appointment as Artistic Director, Native Earth had had four ADs in two years. After 25 months of being in the position, there is still no succession plan, although a board development and strategic planning process that will lead to a succession planning process is underway. Yvette pointed out that although the advice on alignment of succession planning to organizational strategies is wonderful; it is hard to do when the organizational strategy is survival. Succession planning at Native Earth is further challenged by the cultural mandate of the organization, which narrows the playing field of available candidates. Yvette concluded by pointing out that the person who turns an organization around is not necessarily the person to lead it into the next developmental phase.

**Kim Tomczak** is one of the founders of the artist-run centre V tape. Three years ago Kim and his partner, Lisa Steele, informed the board that their roles in the organization would be changing, thus evolving the organization into a form of succession planning. Kim's duties have shifted from day-to-day management to the creation and building of a new centre; Lisa's duties have changed from financial management to Artistic Director. V tape has always had a built-in ability to plan for succession owing to its strong mentorship program with various colleges and universities. Kim suggested that it is more difficult to plan for succession if you are an organizational founder, because of the personal investment. He pointed out that how well one delegates is a good indication of one's readiness for succession planning. Kim identified the inability to retain staff on small salaries and no benefits as a deterrent to succession planning.

**William Lau** is the founder and Artistic Director of Little Pear Garden, a very small organization that promotes and develops Chinese performing arts in Canada. William has embarked on a slow and careful process of succession planning. William offered the following suggestions:

1. There must be a self-readiness to let go and pass on your position.
2. Identify potential candidates, considering the following:
  - Appropriate match in values, work style and personality.
  - Culture-specific considerations.
  - Consistency with organizational mission.
3. Board involvement and timing is critical.
4. Build a profile for the successor:
  - Partner them with a board member to work on a special project.
  - Give them responsibilities, allowing them to take risks.
  - Acknowledge them publicly.

**Kathleen Sharpe** brought the perspective of a Board of Director member to the session. Sharing stories of two boards that Kathleen has been or is a member of, she demonstrated how not having any form of succession plan can lead to an inappropriate hire and contribute on some level to the demise of an organization. Her second tale, in the present tense, involves an active board and good staff, who have no succession plans in place. As chair of the board, Kathleen will, in the very near future, undertake to implement a succession plan. In closing, Kathleen offered the following advice:

1. Don't take anything for granted.
2. Insist that your board set up a committee for succession planning.
3. Institute systems for both staff and board succession.
4. Don't settle for a verbal agreement.
5. When you have a plan – follow it.

## **Q&A – Succession Planning Panel**

The following is a summary of ideas and suggestions that were shared in the question and answer period:

- No matter what size organization you work for, if you want to ensure that a succession plan is put in place, it is the Board of Director's responsibility to activate and see the process through. For larger organizations, where staff might not have access to the Board, one might need to trigger the process via one's supervisor.
- It is important to develop the community of potential successors in the work that you do in order to build a pool of possible candidates.
- For artist-run centres and smaller organizations that face many barriers to being able to develop succession plans,
  1. It is important to always be refining and assessing the organization's mandate with the board.

2. Lower wages lead to inevitable turnover, but this can be built into organizational planning and thinking.
  3. Organizational profile can be raised with post-secondary administration programs in order to build relationships with potential successors.
- Documentation was advocated by many as a tool for succession:
    1. If people in leadership positions develop a narrative of the organization, this can be shared with successors to perpetuate the emotional memory of the organization.
    2. Thorough documentation can remind us of what worked and what didn't.
    3. An Environmental Survey, which acts as a strong reality check, in conjunction with internal narrative would provide clear guidelines for successors.
    4. Handbooks for individual jobs are valuable documents.
    5. A newsletter with contributions of past stakeholders promotes a sense of history.
  - Transparency and knowledge of tasks and responsibilities up and down the ladder is advantageous in dealing with emergency situations.
  - Artist-founded, culturally specific organizations face unique issues in succession as they are rooted in many communities. Suggested solutions included the following:
    1. Selecting and building a new generation of arts managers with different skills than the founder.
    2. Building a collective of several people to take on the single role the founder filled.
    3. Rotation of leadership roles.

## Summary of Rick Lash's The Leaders' Journey Session

In his introduction Rick asked: "How do you as leaders in the arts community create an environment where you are not only doing great things as leaders in your own right but also doing great things for the people coming up behind you?" He thus identified the challenge of effective leadership as understanding how we encourage those behind us while continuing to be successful and develop ourselves. In keeping with the theme of the conference, Rick identified a powerful aspect of regeneration as recognizing where we have common ground with our peers.

Rick outlined the three topics that he would cover:

1. Definition of leadership excellence.
2. Becoming a leader requires a transformational process.
3. Regardless of your generation or time in history there are common themes or stages to the leaders' journey.

In defining leadership Rick offered two quotes from Kouzes and Posner:

*"...the art of mobilizing others to want to struggle for shared aspirations..."*

*"...leadership is a reciprocal relationship between those who choose to lead and those who decide to follow..."*

Leaders who can build relationships and trust, manage emotions, create a shared vision and inspire others are identified as defining leadership excellence.

Each of these characteristics requires "emotional intelligence" – the recognition and management of not only our own emotions but also the emotions of others.

This brings us to the question of what causes people to transform and inspires us to be leaders. Rick suggested that in the face of this question we need to think back to our original calling and what inspired us then. We must recognize that many of our original strategies will stop working for us, often triggering or necessitating a transition. Some suggested transformational experiences include the following:

- Early work experiences.
- First time managing people.
- Fixing a crisis.
- Leading a project team.
- Increasing in job scope or responsibility.
- Business failure.
- Demotion or being fired.

- Dealing with an employee performance problem.
- Breaking out of a rut.
- Switching jobs or careers.
- Personal traumas.
- Completion of formal education.

Rick then identified the maturity process in the growth of an effective leader. We move from a focus on ourselves, which is critically important to our development early in our careers, to a shift that involves a move away from self to a focus on our community and working with others. The following are personal transformations that Rick identified in the growth of a leader:

Shift from...		Toward...
Self focus	<b>PREPARATION TRANSITION TRANSFORMATION</b>	Community focus
Task driven		Relationship driven
Accountable for self		Accountable for others
Personal mastery		Mentoring or teaching others
Personal achievement		Significance and contribution

The leader's journey, no matter who we are and where we live or have lived, is marked by the similar leadership issues and characteristics that we all face:

- Competency – feelings of inadequacy.
- Changing relationships with peers when promoted.
- Having to give things up to encourage the growth of those around you.
- Re-evaluation and development of a new sense of purpose, values, beliefs and commitment.

*"Stories touch us so deeply because they help give visibility to things we can't quite articulate in words."*

Citing Joseph Campbell's study of myths and their underlying and common themes, Rick pointed out that what compels us about the characters of myths and stories is that they are in transformation on both an emotional and intellectual level. There are common stages that all heroes of myths and stories go through:

1. The Call.
2. Preparation.
3. Crossing the Threshold.
4. Finding Support.
5. Road of Trials and Facing the Abyss.
6. Transformation and Return.

*"Build it and he will come."*  
Ray Kinsella – *Field of Dreams*

**1 - The Call** may come:

- Although we might not be sure what it means, or what we have to do about it.
- At various stages – often when something is lacking in our life or career.
- When we are at a loss as to our purpose.
- When we are overwhelmed by systemic restraints.
- When we are feeling accountable only for one self.
- When our strategies are no longer effective.
- When we discover or re-discover a talent.
- Unexpectedly.
- From within or from outside.

Rick demonstrated "The Call" by showing a clip of the film *Dead Poets Society*.

**2 - Preparation** has certain hallmarks:

- Withdrawal and removing oneself from one's normal surroundings.
- Reflection on one's situation, seeking patterns and themes.
- Evaluation of what is important, one's strengths and weaknesses and the establishment of a code of honour to see you through the journey.

**3 - Crossing the Threshold** represents the movement from the known to the unknown, involving

- Taking concrete action.
- Facing our threshold demons.
- Self-doubt and weakness.
- Giving up a part of who we are as an individual to move forward.
- Allowing past experiences that have become invalid to be left behind.

**4 - Finding Support** represents the appearance of a helper who

- Provides perspective, assistance, support and a different view of self.
- Often appears from unexpected places and bearing gifts.
- Offers advice on what to expect, having had experience.

*"You need to help yourself by identifying people to help support you through the transition phase."*

The phases of Crossing the Threshold and Finding Support were demonstrated by a scene from the film *Shirley Valentine*. The phases of Crossing the Threshold with examples of facing one's demons were demonstrated by a scene from the first *Lord of the Rings* film.

*“ The reality is that we don't get there from here. The only way figure things out is by actually forcing ourselves to go on the road of trials.”*

**5 - The Road of Trials and Facing the Abyss** involve

- A series of experiences that test our resolve and build our character.
- Challenges that become more difficult as the journey progresses.
- A series of tests that results in new values and behaviours that become embedded as we build a new identity.
- Often encountering many abysses in our journeys, coming face to face with the core of who we are.
- Facing our own personal obstacles, things that have held us back, that must be resolved to allow us to move on, giving us a deeper insight into ourselves.
- Gaining the strength and purpose to move forward.

Having come through the abyss we come away a fundamentally different person, having gained deep insight. The hero in most stories returns having transformed from an individual contributor into a mentor or leader of others.

**6 - Transformation and Return** is characterized by returning home with self-knowledge and a willingness to share our wisdom and perspective.

The power of transformational leadership was demonstrated in the last scene of the film *Dead Poets Society*.

Rick closed with a story of a mural in Grand Central Station in New York City. Over the years the mural became covered in grime. A clean-up project uncovered the design. One brick was left uncleaned, to demonstrate the difference. Rick asked us to remember why we chose the arts as a calling and to remember that underneath our experience is our personal mural, waiting to be uncovered by those of us willing to undertake the journey.

## **Closing Session - Open Mic**

The Closing Session consisted of an open-mic session for delegates to share their impressions of the conference. Below is a review of some of those thoughts:

- An appreciation for the benefits of having many generations working in arts organizations, along with the tools that the conference offered, to seek ways to continue the integration of generations.
- The opportunity to meet with so many people with similar circumstances. An opportunity was identified to develop an ongoing peer relationship or professional learning circles for smaller organizations without means to have development or an umbrella organization.
- The question of mentorship received varying comments:
  1. A mentor/mentee reception to encourage connections.
  2. Encouragement to funders to continue positive acknowledgement of mentoring activities in funding policies and guidelines.
  3. The creation of a secretariat for mentorship is not a solution; there are national ASOs in place who can facilitate mentorship strategies.
  4. A possible solution might be the creation of positions in all organization, allowing current management to mentor ongoing operational staff.
- Perhaps a follow-up conference could offer more for senior leaders.

## **Closing Remarks**

Glenn Hodgins, on behalf of OAC, thanked the delegates for their feedback and encouraged everyone to fill out the conference evaluation online. Thanks were extended to the Steering Committee, Young Managers' Roundtable, the speakers, panelists, presenters, Mary Rowe for her facilitation, and the OAC staff for their contributions.