



CREATIVE
TRUST

COLLABORATING TO BUILD
AUDIENCES

Creative Trust Open Source Tool Kit

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720 Bathurst Street, 3rd Floor, Toronto, Ontario M5S 2R4
416.705.6256 | jini.stolk@creativetrust.ca | jini@torontoarts.org

Contents

Introduction: Collaborating to Build Audiences	3
Strategic Consultation Process.....	6
Strategic Plan: Creative Trust’s Next Phase 2008 to 2010.....	10
Next Phase Organization Chart.....	21
About the Audiences Project	22
Year 1 Timeline	29
Audiences Project Communications Plan.....	32
Audiences Project Launch Letter	35
Audiences Package.....	42
Database and Box Office Technology: Work Plan Notes with Richard Carter.....	47
Database and Box Office Technology: Summary of Situations.....	49
Audience Engagement Project Revised Budget.....	58
Audience Engagement: An Action Learning Program.....	61
Audience Engagement: A Close Examination Workshop.....	68
Audience Engagement Survey Protocol (with notes).....	72
Audience Engagement Survey: Summary Power Point Presentation	80
Audience Engagement Individual Depth Interviewing Exercise Orientation Session.....	100
Audience Engagement Individual Depth Interviewing Exercise.....	106
Performing Arts Education Overview (PAEO) Communications Plan	115
Invitation to Participate in the Performing Arts Education Survey.....	118
Performing Arts Education Overview Interview Questions.....	120

Performing Arts Education Overview Launch Event: Agenda	123
PAEO 2012 Roundtables and Workshops: Announcement.....	125
Diversifying Audiences: Donna Walker’s Workshop Proposal	126
Invitation to Diversifying Audiences Workshop	126
The Sun Life Performing Arts Access Program and Picasso PRO Backgrounder.....	129
Arts Access Program Press Release	131

Creative Trust’s complete records and documents are available at the University of Guelph Library’s Archival and Special Collections Department. For information on the collection contact libaspc@uoguelph.ca

Creative Trust Open Source Tool Kit

Collaborating to Build Audiences

Introduction

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

It was Creative Trust's intention from the beginning to sunset after its work was completed and its goals achieved. In October 2012, having helped Toronto's performing arts companies improve their governance, planning and management skills, eliminate deficits, and acquire and maintain working capital reserves, we announced our closing. The Creative Trust legacy includes a measurable and sustained positive impact on the health and stability of many of Toronto's most important mid-size and small music, theatre and dance companies. The work has also had an impact on the arts community beyond. Participants were involved in learning activities which helped them rethink assumptions and

change the ways they work; they gained new skills and insights and put them successfully into practice – raising the bar for everyone. Through Creative Trust, Toronto's performing arts community embraced the value of open sharing and collaboration.

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

Collaborating to Build Audiences

Creative Trust's Audiences Project, launched in 2009, was the most in-depth and multifaceted community audience development initiative in Canada. It grew out of our belief that the arts should be a part of everyone's life at every life stage, and that art can provide opportunities for learning, understanding, and connecting cultures - even as it provides beauty and joy.

It was also clear that without committed and growing audiences for live performing arts, Creative Trust's efforts to build stable and sustainable arts companies would eventually founder.

The Audiences Project engaged Creative Trust members in an in-depth learning process - from engaging and diversifying audiences; arts education and accessibility; data base and box office technology; to the use of social media - drawing on the most successful and best informed practices from our own city and around the world.

The Audiences Project had an intense and positive effect on participating individuals and companies during its almost three-year course. Participants gained new skills and insights and put them successfully into practice – raising the bar for everyone in the arts community. They were involved in research that helped them rethink assumptions and change the ways they work.

Perhaps most importantly, they also embraced the value of open sharing in an area that is often viewed as competitive, but that really requires collaboration to achieve profound and lasting impact.

Strategic Consultation Process

The Audiences Project concept, goals, and format were developed during an intense process of consultation between June 2007 and June 2008, with members and stakeholders.

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

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

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

Group sessions were oriented to the professional leadership of our member companies (Artistic Directors and General Managers/Managing Directors). The Taking the Pulse sessions affirmed that

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

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

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

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

Community Consultations, List of those consulted

Participating Companies, Round One

Ballet Jörgen Canada
Buddies in Bad Times Theatre
Dancemakers

Elmer Iseler Singers
Kaeja d'Dance
Lorraine Kimsa Theatre for Young People
Opera Atelier
Tafelmusik Baroque Orchestra and Chamber Choir
Tapestry New Opera Works
Théâtre français de Toronto
Toronto Dance Theatre

Participating Companies, Round Two

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

Outreach Companies

Cahoots Theatre Projects
Clay and Paper Theatre
The Theatre Centre

Arts Service Organizations/ Arts Funders/ Stakeholders

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

Ontario Museums Association
Ontario Nonprofit Network
Ontario Trillium Foundation
Ottawa Arts Council
Ottawa Culture Office
Professional Association of Canadian Theatres (PACT)
PQR Foundation
Toronto Alliance for the Performing Arts (TAPA)
Toronto Arts Council
Toronto Arts Council Foundation

Strategic Plan: Creative Trust's Next Phase 2008 to 2010

The Strategic Plan outlining the Audiences Project and other 'next phase' activities, was endorsed by the Board of Directors on June 3, 2008.

Overview

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

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

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

The recommendations below reflect those priorities.

Recommended Focus and Programs

I recommend that our first focus be on deepening our mission through two **keystone initiatives** with Creative Trust companies, arising from our work to date. The first is to assist with the many

capital projects being planned by Working Capital and Outreach companies – helping them plan and execute these projects successfully, and thereby contributing to Toronto’s range of appealing and accessible small and mid-size performing venues. The second is to engage all Creative Trust members in a deeper initiative around audience development – helping Toronto’s creative theatre, music and dance companies build strong and committed audiences now and in the future.

In response to urgently stated community need, I recommend that we continue our professional development activities and broaden them into a **learning, leadership development and networking initiative**. This will include continuing to provide opportunities for the community to learn management skills from leading experts, and learn from each other by sharing what works. We will also identify and encourage individuals to take on future leadership roles, and facilitate an ongoing network of communication and collaborative action that will allow the community to continue to act on its own behalf after Creative Trust.

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

Keystone Initiatives

Creative Trust has always understood that working capital is only one of the capital needs of performing arts organizations, and affordable, accessible, appealing and safe facilities and performing venues are essential for the community to thrive. Many Creative Trust companies are now poised to tackle the space issue, and Creative Trust is ideally positioned to help make sure that they do so successfully.

Toronto Theatres Initiative

Thirteen Creative Trust companies are currently planning or in the midst of repairs, renovations or expansion of their facilities. These are not optional projects; Toronto's mid size and small performing arts spaces are in urgent need of attention. At a Capital Projects Roundtable in January 2008, companies identified five ways in which Creative Trust's assistance would help make their projects a success:

Objectives

- Help change the environment and create the conditions for success by communicating the need and acting as advocate for the rehabilitation of Toronto's small and mid size performing arts venues
- Assist companies to prepare to undertake a capital project; provide assistance and coaching on maintaining artistic focus and organizational strength throughout
- Working in collaboration with ArtsBuild and Artscape, assist with project planning, budgeting and project management
- Contribute to successful fundraising by advising funders of the specific needs and challenges of small and mid size Toronto companies undertaking capital projects
- Assist with project fundraising by identifying and cultivating new public and private funding sources; provide board and capital campaign committee training
- Create a network for companies to share information and learn from each other; create opportunities for conversations with arts organizations whose capital projects are recently completed or underway
- Help these projects meet the highest possible standards of energy efficiency and environmental sustainability

Activities

- Advocate, with ArtsBuild, at all three levels of government for responsive, accessible and appropriate public funding for capital projects by small and mid size performing arts companies in Toronto
- Provide group learning and one-on-one coaching in the areas of readiness, planning, budgeting, fundraising and project management, in partnership with ArtsBuild and Artscape
- Research and identify new public and private funding sources and opportunities; cultivate and encourage prospective new donors where possible and appropriate
- Research and identify targeted funding, incentives and information on how to make these projects accessible and “green;” identify affordable energy efficient and environmentally sound building methods, materials, and suppliers
- Work to encourage and develop bridge-financing opportunities for these projects

Plan of Action

- Convene regular meetings of Creative Trust’s Capital Projects Roundtable; invite guest experts including from large institutions
- Develop and maintain an up to date summary of projects, and a funding needs chart
- With TAC, convene a first meeting on cultural space needs in Toronto, and participate in the resulting Cultural Space in Toronto Funders’ network
- Continue acting as advocate, with ArtsBuild, to the Ministry of Culture on the development of its cultural infrastructure program; with the Department of Canadian Heritage on changes to its capacity building and cultural spaces programs; and with the City of Toronto on its cultural and facilities support programs in order to ensure these programs are aware of and responsive to the Toronto community’s need for small and mid size performance space

- Help identify and cultivate new private sector funders for members' projects
- Partner with ArtsBuild/Janis Barlow & Associates/Artscape and the City of Toronto Economic Development Department on delivering sessions and coaching in project planning, budgeting, management and financing to Toronto companies
- Work with environmental, energy and disability organizations to identify and develop opportunities to assist members' projects to be green and accessible

Funding

- Requires additional administrative funding to close the gap and maintain core staff and office at current level and some additional project funding for seminar leaders and resource materials
- Prospective funders: Ministry of Culture, Department of Canadian Heritage, City of Toronto (for overall strategic direction)
- Prospective partners: ArtsBuild, Artscape, TAC, City of Toronto, environmental and accessibility organizations

Growing Audiences Project

Without strong, committed and growing audiences for live performing arts in Toronto, our efforts to build stable and sustainable arts companies will eventually founder. Creative Trust will develop a program to help our companies understand and embrace the best practices in audience development and retention.

Objectives

- Ensure that audiences maintain their interest in Toronto's creative performing arts and the companies we have been working to sustain
- Focus on changing internal behaviors and ways of working, encouraging and assisting companies to strengthen their connections to their audiences

Activities

- Help companies develop the systems they need to maintain close connections to their audiences and communicate effectively – including data bases and email and web capacity
- Offer learning opportunities in data base use, web 2.0, marketing and communications and overall audience development practice

Plan of action

- Offer the services of a data base expert in small group sessions and/or one-on-one consultations.
- Organize a series of learning sessions in the above areas
- Organize a major audience development seminar, bringing together leading thinkers and practitioners in this area

Funding

- Also requires additional administrative funding to close the gap and maintain core staff and office at current level and some additional project funding for seminar leaders and resource materials
- Prospective funders: Ministry of Culture, Department of Canadian Heritage, City of Toronto (for overall strategic direction), TD Bank for project, PQR for seminar

- Prospective partners: TAPA, CCCO Summer Institute

Learning, Leadership and Networking

There is a strong need and desire within the community to continue learning together. No other organization in Toronto is providing consistent, varied skills development sessions. Creative Trust will continue to provide learning and organizational development opportunities to mid size and outreach companies.

In order to ensure that the gains made through Creative Trust are maintained and that our legacy is a permanently stronger performing arts community, Creative Trust will work to develop leaders within the community and facilitate an ongoing network that can continue to respond quickly and effectively to community needs and challenges.

Objectives

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

Activities

- Offer seminars, workshops, roundtables and other learning and skills development opportunities through December 2010; prepare to hand these over to a partner who can continue past then.
- Continue to offer, as needed, the one-on-one coaching and mentoring services that have been an essential part of Creative Trust's success,
- Consciously bring organizations together, facilitating links, communications, gatherings and opportunities for shared action.
- Integrate the arts community into Ontario Nonprofit Network, a province wide network of nonprofit social benefit organizations formed to identify common issues, act together and strengthen the sector.

Plan of action

- Continue presenting a range of learning sessions including G.S.T. and other financial workshops; a newsletter workshop; and a session on preserving theatre and dance legacies (from current Program Schedule Highlights.)
- Begin our leadership development activities by offering Simon Heath's workshop on *Speaking to Inspire: effective communications and presentations* to selected individuals within Creative Trust
- Develop Creative Trust's data base and other communications systems in order to be better able to bring people together, virtually and actually, to learn and collaborate.
- As a member of the ONN Steering Committee, ensure that the arts community is aware and involved in this nonprofit network.

Funding

- Also requires additional administrative funding to close the gap and maintain core staff and office at current level and some additional project funding for seminar leaders and resource materials
- Current partner and funder: The Canada Council for the Arts Equity Office
- Prospective funders: BMO, Great-West Life, The Canada Council for the Arts (which has leadership development as one of its core priorities)
- Prospective partners: TAPA, Theatre Ontario, PACT, CDA, Orchestras Canada, CCCO's Summer Institute

Sharing and Mentoring

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

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

Objectives

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

Activities

- Act as “change consultant” to selected sustainability initiatives: advise them in seeking project funding, assist them in exploring feasibility; provide guidance and direction to their projects as requested
- Be available to facilitate meetings, conduct workshops, and speak at seminars
- Produce and distribute materials on Creative Trust’s Working Capital for the Arts and Outreach programs’ methods and results
- Encourage, mentor or sponsor, as appropriate, selected complementary sustainability initiatives

Plan of action

- Use the Literary Press Group as the pilot project for working with other arts disciplines: the LPG has identified a funder and applied for support to study the feasibility of a capacity building and sustainability initiative for small publishers
- Use the City of Ottawa as the pilot project for working with other municipalities: the Ottawa Arts Council has secured funding and asked Creative Trust to assist with a sustainability program patterned on our Outreach Initiative
- Explore the possibility of partnering with the Toronto Arts Council on a pilot project to increase the fundraising skills and capacity of small to mid-size arts organizations
- Continue to respond as possible to requests by other cultural clusters, arts service and membership organizations, and nonprofit groups to assist with sustainability projects and issues

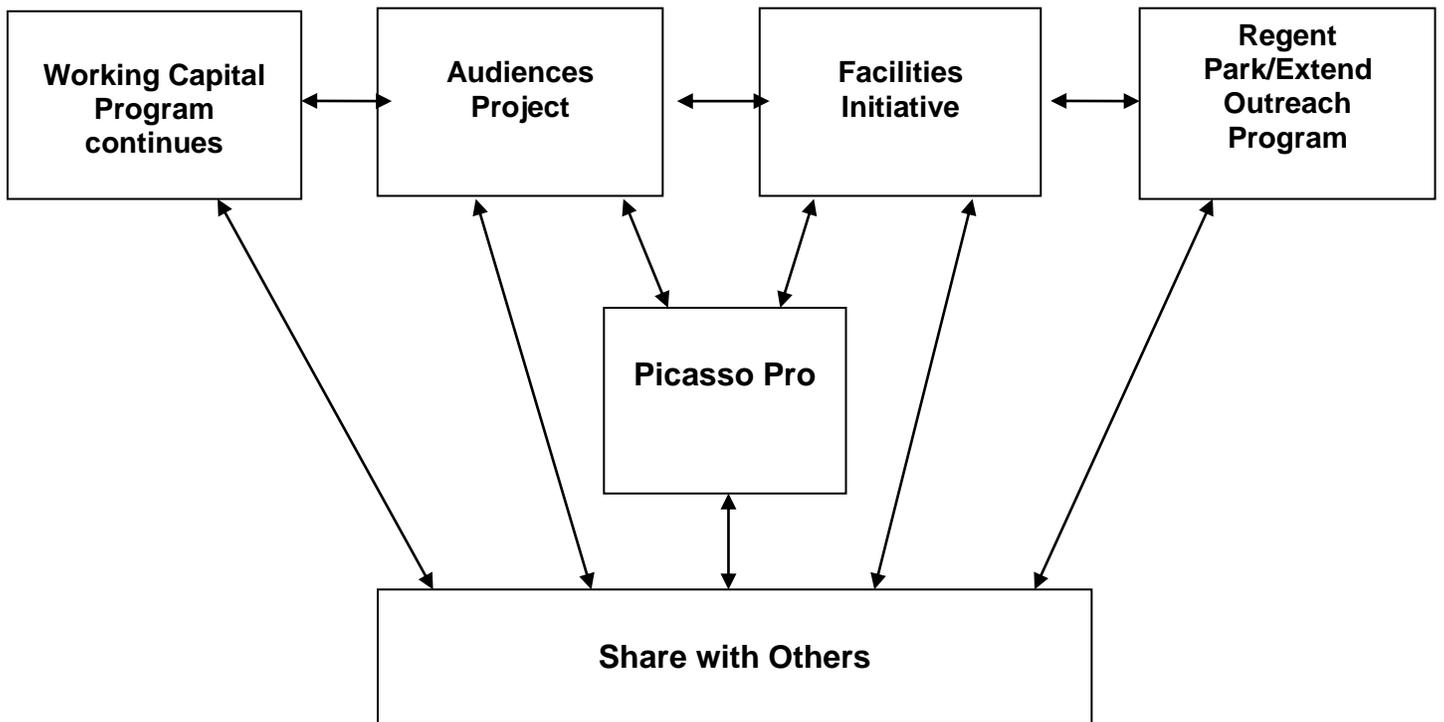
Funding

- These activities would be done on a cost-recovery basis; Creative Trust would serve as the “change consultant,” recovering its costs, including staff time, through fees
- Prospective funders: the Ministry of Culture and DCH (as above)
- Prospective funder/partner: The Trillium Foundation (which has expressed interest in Creative Trust advising on the establishment of arts sustainability programs province-wide.)
- Prospective partner: The Toronto Arts Council

Next Phase Organization Chart

Submitted to the Creative Trust board to clarify the relationships between our Working Capital and “Next Phase” projects.

Creative Trust: Building a Sustainable Community



About the Audiences Project

Our first overview of the Audiences Project for prospective funders.

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

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

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

Objectives

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

Partners

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

- Potential partners include the Canada Council Audience and Market Development Outreach Office; the Ontario Arts Council Arts Education Office; the Canada Council for the Arts Dance, Theatre and Music Offices; The Ontario Trillium Foundation; Prologue for the Performing Arts; eyeGO to the Arts; and large performing arts companies including the National Ballet of Canada.

Plan of Action

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

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

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

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

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

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

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

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

- Organize a major audience development seminar, bringing together leading thinkers and practitioners in this area
- WITH PARTNERS, work to increase overall audience participation in Toronto's performing arts community, in both numbers and repetition
- WITH PARTNERS, work to increase the City of Toronto's understanding of the essential role of the arts in its future, and the value and impact of its policies and programs to advance and support the arts
- WITH PARTNERS, work to increase the perceived meaning and value of participation in the creative performing arts

Preliminary Program Schedule Highlights

YEAR ONE

- July 17** Audiences Project Roundtable 1, *Community Sounding on Audiences*.
- July 22** *Data and Systems: More than just a name and address*, best practices and organizational self assessment of data and technology needs with Richard Carter.
- August** *Box Office/ Database Systems demonstrations/ discussions* facilitated by Richard Carter.
- October** Technology and Techniques, *Twitter Talk* panel on the how to's and challenges of using Twitter with TechSoup Canada, Soundstreams and others TBC.
- October and into 2010** Ongoing one-on-one sessions with Richard Carter to help facilitate organizations' transfers to new database/box office systems as identified in earlier workshops.
- November/December** Work with Alan Brown begins ***Phase 1: Audience Engagement – A Close Examination*** day-long seminar focusing on the topic of audience engagement including keynote, panel presentation on exceptionally promising new audience engagement practices (US and Canadian resources), speed dating roundtables and a facilitated brainstorming session.
- 2010**
- January** Technology and Techniques, *Reaching Youth Online* a live and web based panel about tweeting, texting and more. Panelists from Tdot

and, via web uplink, NYC's High 5 Teen Reviewers and Critics TRaC and others TBC.

February	Alan Brown <i>Phase 2: Survey of Engagement Preferences</i> data collection on a cross-section of audiences.
March	Alan Brown <i>Phase 3: Participatory Interviewing Exercise</i> two intensive cycles of individual in-depth interviews with audience members – each cycle takes place over a two day period.
April	Second set of Participatory Interviews.
May	Technology and Techniques, <i>Web Usability: Getting the most out of your website</i> with Steven LeMay of Usability Matters.
September	<i>Diversifying Audiences</i> with Donna Walker Kuhne, followed by small group working sessions

Sessions to be confirmed:

- Technology and Techniques, *Customer Service Management* panel with co-presenter TAPA
- Technology and Techniques, *Using Web 2.0 to increase online fundraising* with speakers from Imagine Canada and others TBC
- *Preserving our Legacies*, panel on preserving archives, recording performance history information, costumes etc. Case Study of Danny Grossman Dance Company's work and others

Year 1 Timeline

Early project timeline accompanying a request for funding.

Project Description

We are looking for support to undertake Year One of an in-depth two-year Audiences Project; provide roundtable discussions, seminars and one-on-one training to a wide range of companies; and place new emphasis on audience development as a key component of stable organizations.

The Program activities outlined below have four major objectives:

Objective: Help Creative Trust companies understand the best practices in audience engagement, development and retention; focus on changing internal behaviours and ways of working, encouraging and assisting companies to strengthen their connections to their communities and audiences; set specific audience development goals in each company's Work Plan

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

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

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

Timeline

TIME	ACTIVITY / OUTPUT	FOCUS
PRELIMINARY WORK 2008		
APRIL MAY JUNE	Finalized strategic plan and presented to Board Announced project plan to members at AGM	Develop Project
JULY AUG SEPT	Began forming Advisory Secured key project partners	Develop Project
OCT NOV DEC	Announced Audiences Project to members and constituency Surveyed members on primary needs, interests, current capacity Workshops 1 and 2 (Kelly Hill and Donna Walker Kuhne) Created ongoing communications plan and format	Launch Project Plan and prepare for future activities Explore audience trends; introduce best practices in diversifying audiences
YEAR ONE		
FEB	Workshop 3 (Alan Brown)	Impacts of arts participation and Peer to Peer marketing
MARCH/APRIL	Refining content and curriculum with Advisory Confirm lead associate for systems and technology workshops Secure funding partners	Richard Carter to develop 3 workshops on data management/ box office systems for Creative Trust Ministry of Culture through CSIF program confirmed TD Financial Group confirmed as major corporate sponsor

JULY AUG SEPT	Began forming Advisory Secured key project partners	Develop Project
OCT NOV DEC	Announced Audiences Project to members and constituency Surveyed members on primary needs, interests, current capacity Workshops 1 and 2 (Kelly Hill and Donna Walker Kuhne) Created ongoing communications plan and format	Launch Project Plan and prepare for future activities Explore audience trends; introduce best practices in diversifying audiences
YEAR ONE		
FEB	Workshop 3 (Alan Brown)	Impacts of arts participation and Peer to Peer marketing
OCTOBER / NOVEMBER	Workshop 10	Diversifying Audiences with Donna Walker Kuhne. Participants work in small groups to flesh out marketing and outreach plans
NOVEMBER	Lunch and Learn 2	Using Web 2.0 technologies to increase online fundraising with speakers from Imagine Canada and others TBC
DECEMBER	Lunch and Learn 3	Lunch and Learn 3, Web Usability: Getting the most out of your website with Steven LeMay of Usability Matters

Audiences Project Communications Plan

Project & Communications Objectives:

- To ensure that as many Creative Trust (CT) members as possible participate fully in the project
- To impart knowledge that has practical applications, leading to increased audience engagement and retention – ideally, increase audience numbers and/or activities by 20 per cent in the next two years
- To keep participating CT members informed about and interested in all components of the project: Engaging Audiences, Diversifying Audiences, Access and Education programs, as well as various seminars, workshops and collaborative learning opportunities
- To maximize the impact of the project by tracking and measuring the effects of the program on the community as a whole
- To inform the broader arts community, funders and other stakeholders, both locally and nationally, about the project
- To attract media interest in the project and obtain media pick-up/coverage

Target Audiences:

- Creative Trust members – principals, key staff and board members
- Creative Trust and membership funders, partners and sponsors
- Other principals and decision-makers in Toronto’s broader performing arts community
- Media – print, television and online including: performing arts journalists and editors; trade magazines and newsletters; ethnic/community newspapers and periodicals; blogs

- Theatre-going public and potential new audience members

Key Messages:

- Creative Trust companies are eager to understand and attract new audiences
- Effective audience development will benefit the sector as a whole
- Performing arts companies are proactive and confident about the future of their organizations and art forms
- Audience members with disabilities deserve the opportunity to participate in the creative performing arts
- Collaborative learning works to reinforce new ideas, practices and community values

Strategies:

- Contract leading-edge audience research, engagement and marketing specialists to lead workshops – Alan Brown, Donna Walker Kuhne, Rose Jacobson, Patty Jarvis and Kelly Hill
- Invite and communicate with CT company principals and key staff members – obtain buy-in for all components and phases of the project
- Create local buzz – leverage community networks and their communications vehicles to get the word out and boost attendance at workshops
- Target key performing arts journalists and editors and pitch long-lead and/or exclusive stories

Tactics:

Meetings/Discussions/Presentations

- Hold roundtable discussions for all CT stakeholders and review current state of affairs – make minutes/notes available ASAP and post on CT website
- Accept speaking opportunities (Jini Stolk; Mallory Gilbert)

Media Kit/Release

- Update media contacts to include Toronto journalists and editors of print and online media – include disabilities, diversity and education press
- Develop relationships with key performing arts and lifestyle writers/columnists and editors – pitch various aspects of the Audiences Project to major dailies and long-lead magazines (i.e. Toronto Life)
- Create a media kit that includes: backgrounder on the project; media release; disc with print-quality photos (seminars, workshops etc.) or make these available for download (with password) on CT website
- Consider holding a media conference – first performance of Access pilot project
- Internal communications – create an Audiences Project web page/blog with reciprocal links between CT and participating members' websites – post regular updates
- External communications – CT e-blast, e-newsletters and members' and partners' vehicles; disseminate findings and reports in print and electronically

Audiences Project Launch Letter

October 2008

Introducing Creative Trust members to the plans and first initiatives of the Audiences Project.

Dear Creative Trust Members,

As you know, we've recently completed a strategic plan for Creative Trust's next few years – identifying the most important needs within the community that Creative Trust, with the experience and expertise we've developed, is uniquely qualified to meet.

It was decided that our focus will be on deepening our mission through two **keystone initiatives** with Creative Trust companies. The first, which many of you are aware of, is to assist with the capital projects being planned by Working Capital and Outreach companies.

The second, which we are announcing to you today, is to engage all Creative Trust members in a deeper initiative around audience development – helping Toronto's theatre, music and dance companies build strong and committed audiences now and in the future.

It's clear that without strong, committed and growing audiences for live performing arts, Creative Trust's efforts to build stable and sustainable companies will eventually founder. Our Audiences program will be designed to help companies understand and embrace the best practices in audience development and retention.

Objectives

- Ensure that audiences maintain their interest in Toronto’s creative performing arts and the companies we have been working to sustain.
- Focus on changing internal behaviors and ways of working, encouraging and assisting companies to strengthen their connections to their audiences.

Activities

- Involve artistic, management and board leaders in consistent dialogue and learning about engaging audiences and increasing demand for live performing arts experiences.
- Help companies develop the systems they need to maintain close connections to their audiences and communicate effectively – including data bases and email and web capacity.
- Offer skills development opportunities in data base use, web 2.0, marketing and communications and overall audience development practice.

We do not want to duplicate the good work of organizations like TAPA and CCI so we will be working with partners throughout this process to take advantage of sharing international speakers, resources and ideas.

We are pleased to announce our first sessions, and will send more dates as sessions and opportunities become confirmed. Please mark these dates into your calendars.

Kelly Hill

November 11, 2:00 to 4:30 p.m.

We are happy to welcome Kelly Hill from Hill Strategies to speak on *Performing arts attendance in Ontario*

Kelly Hill's presentation will cover key information about performing arts attendance in Ontario, mixed with a deeper understanding of why people attend and what they get from attending performances. Participants will discuss the implications of the findings and, time permitting, some additional tidbits of info will be presented.

Participants are encouraged to think about what they would like to know about their audiences prior to attending. Bring a list of questions!

You can read up in advance on some of Kelly's informative reports and studies at <http://www.hillstrategies.com/>

Kelly Hill is President of Hill Strategies Research, a Canadian company that provides insightful evidence about the arts. Hill Strategies Research publishes the Arts Research Monitor and Statistical Insights on the Arts series and also conducts commissioned research projects. Kelly holds a Master's degree in Political Science from the University of Western Ontario and a Bachelor's degree in Economics from Université Laval in Quebec City.

Location: 215 Centre for Social Innovation

Donna Walker Kuhne

November 17, 10:00 to 11:30 a.m. followed by smaller working groups of ADs and GMs

Partnering with Harbourfront Centre we are pleased to welcome Donna Walker Kuhne who will address Harbourfront staff and Creative Trust members, followed by a hands-on workshop for Creative Trust General Managers and Artistic Directors.

Acknowledged as the foremost expert in the U.S. on Audience Diversification by the Arts & Business Council, Donna Walker-Kuhne, an accomplished arts administrator and adult educator, has devoted her professional career to increasing the accessibility and connection to the arts by our rapidly growing multicultural population.

“I firmly believe that the arts are the only pure vehicle we have in today’s society that cross cultural and ethnic barriers and allow people to transcend their differences.”

Location: Harbourfront Studio Theatre

Alan S. Brown

February 9th, 2009 2:30 to 5:00 pm

Partnering with CCI and the Ontario Arts Council we are pleased to be hosting Alan Brown who will be speaking on understanding the impact of experiencing the performing arts on our audiences, collecting direct feedback from attendees, and using it to sharpen our planning processes and empower peer to peer marketing in our organizations.

Alan is a leading researcher and management consultant in the nonprofit arts industry. He has studied audiences, visitors and patterns of cultural participation in almost every major market in the U.S. His work focuses on understanding consumer demand for cultural experiences and on helping cultural institutions, foundations and agencies to see new opportunities, make informed decisions

and respond to changing conditions. He has authored numerous articles and reports on audience behaviors, trends in cultural participation, engagement practices and stakeholder value.

Recently, Alan has been writing and speaking about the value system surrounding arts experiences. His essay "An Architecture of Value" appeared in the spring 2006 edition of Grantmakers in the Arts Reader, and serves as the basis for keynote addresses at conferences.

We are also working on finalizing two additional components of the Audiences Initiative: the first will assist companies to develop the best and most appropriate systems to maintain their connections and communicate effectively to their audiences – including data management and online resources.

The second will explore the role and impact of arts education activities on current and future audiences, and their contribution to the development of youth and society.

As always we welcome feedback and guidance from our member companies. We have attached a short survey to best help identify further sessions and needs. Please take a moment to fill it out and return it by email to shana@creativetrust.ca.

Yours in growing audiences,

Jini, Shana, Jane, and the rest of the Creative Trust Team including

Audiences Advisory Committee members Patty Jarvis and Caroline Holloway

Audiences Survey

1. Are your audiences currently growing? Declining? Holding the same? Are you noticing any trends, change in demographics, buying patterns etc?
2. Do you currently have a concrete plan for growing and developing audiences? Is this a marketing plan or does it involve all areas of your organization? Briefly describe or attach it.
3. What sort of Arts Education activities are you undertaking and for what age (children, young adult, adult, seniors?) Are they having the impact you anticipated and planned for?
4. Have you had any external technical assistance with audience development (outside of Creative Trust, such as Flying Squad) in the past three years? Describe the type of assistance, who provided it and what the outcomes were.
5. Do you feel that your existing systems (database/box office software etc) are working for you? If you need assistance, what would be most useful (help with exploring options/products/best practices?)

I am interested in participating in Creative Trust's Audience Development project and will commit to attending or sending staff from my organization where appropriate and sharing our learnings and best practices so that others may learn from them.

Yes _____

No _____

If you have answered No please briefly explain why:

Managing Director/General Manager

Artistic Director

Print Name

Signature

Print Name

Signature

Audiences Package

2009 overview of the Audiences Project.

CREATIVE TRUST

PRESENTS



THE AUDIENCES PROJECT

ENGAGING COMPANIES IN BUILDING,
BROADENING & DIVERSIFYING AUDIENCES

AUDIENCES PROJECT

Overview

We believe that the arts should be a part of everyone's life; that the arts provide unique opportunities for learning, growth, understanding, connecting culture, peaceful co-existence and the exchange of ideas; that the arts can play a positive, transformational role in peoples' lives; and that art can provide opportunities for healing and problem solving, even as it provides beauty, joy and challenging ideas. We are committed to building strong and growing audiences for live performing arts in Toronto: audiences that are integral to the future of stable and sustainable arts companies.

The Audiences Project is a two-year initiative to engage Creative Trust members and participants in an in-depth approach to community engagement and audience development. We draw on the most successful and best informed practices from our own city and around the world.

Creative Trust is committed to delivering a program of broad and measurable impact by monitoring the results and tracking the effectiveness of our efforts. To that end, we will document and disseminate the program's findings and results and share them widely across the arts communities of Toronto and Ontario.

Following on last year's introductory sessions with Kelly Hill (Hill Strategies), Alan Brown (Wolf/Brown) and Donna Walker Kuhne, we are excited to launch the Audiences Project and invite you to join in this continuum of learning.

1

ENGAGING AUDIENCES

Facilitated by Alan Brown

Thursday December 10, 2009 (all day)

Phase 1: Audience Engagement – A Close Examination

Our program will kick off with a day-long seminar focusing on the topic of audience engagement. We are putting the finishing touches on the schedule, but here are some highlights you can look forward to:

- Discussion of Lynne Connor's essay *In and Out of the Dark: A Theory of Audience Behaviour from Sophocles to Spoken Word* – Lynne will join us on Skype
- A presentation on exceptionally promising new audience engagement practices and research on audience preferences
- "Speed Dating Roundtables" on new or emerging engagement practices
- A facilitated brainstorming session focused on conceptualizing new approaches to audience engagement

Friday December 11, 2009, 12-1:30 p.m.

Studio Theatre, Harbourfront Centre

Engaging Audiences: an Executive Summary – session for arts leaders with Alan Brown

Early winter 2010

Phase 2: Survey of Engagement Preferences

In collaboration with member companies, we start collecting data on a cross-section of Their audiences to provide information on how their audiences feel about engagement activities.

Working with Alan and Kelly Hill, we will find out how people like to be involved in art, how they prepare for arts attendance, how far in advance they plan and what form of post-performance activity they like. Versions of the survey will be customized for theatre, music, and dance organizations.

Each company that participates will receive a professional top-line report of the findings for their organization.

Early spring 2010

Phase 3: Participatory Interviewing Exercise

Alan will design and facilitate an intensive two-day cycle of individual interviews by participating companies with audience members. Together we will build an understanding of audience members' values and motivations and how they like to engage with art.

Materials and training will be provided. Participants will learn hands on interviewing techniques, and attend the group synthesis session.

THE OUTCOME: A deeper understanding of what motivates audiences and how they want to engage.

2

AUDIENCES PROJECT

First things first: systems

A primary objective of the Audiences Project is to help Creative Trust companies evaluate, select and transition to systems that connect them to their audiences and supporters. Databases, box office systems and communications tools play an integral role in engaging and maintaining audience and patron interest. Appropriate systems make for deeper, more effective relationships between organizations and their constituencies and have long-term implications for the financial and artistic health of performing arts companies.

So far, we have covered the following:

- Sessions on identifying and evaluating company needs and choosing the appropriate integrated box office or database systems
- Demonstrations of the best box office and database systems for use by Canadian not-for-profits
- Support and assistance to over 20 Creative Trust companies so far in transitioning to new and better systems

Coming up ...

- **An Aggregated Report on Audience Motivation & Engagement Preferences** in collaboration with the City of Toronto and a **Survey of Arts Education Practices, Reach and Impact** in collaboration with the Professional Arts Organization Network for Education (PAONE)
- **Diversifying Audiences with Donna Walker Kuhne** — beginning in summer 2010 and for a six-month period, marketing and outreach plans are analysed and fleshed out with follow-up sessions in small group teleconferences
- **Web 2.0 tools and technologies** — *Twitter Talk* with Catherine Skinner, *Getting the Most Out of Your Website* with Steven LeMay, plus blogs, youth outreach and optimizing on line fundraising/audience communications
- **Customer Service Management**— panel co-presented with TAPA
- **Salon 1** — a debate about the role of organizations in assisting audiences to understand the arts experience
- **Salon 2** — the role of arts education: audience builder or vehicle for social change and appreciation of culture?

3

AUDIENCES PROJECT

Biographies

Alan Brown is a leading researcher and management consultant in the non-profit arts industry. He has studied audiences, visitors and patterns of cultural participation in almost every major market in the U.S. His work focuses on understanding consumer demand for cultural experiences and on helping cultural institutions, foundations and agencies to see new opportunities, make informed decisions and respond to changing conditions. He has authored numerous articles and reports on audience behaviours, trends in cultural participation, engagement practices and stakeholder value. Recently, Alan has been writing and speaking about the value system surrounding arts experiences. His essay, *An Architecture of Value*, appeared in the spring 2006 edition of Grantmakers in the Arts Reader, and serves as the basis for keynote addresses at conferences.

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Acknowledgements

Creative Trust thanks all of our partners for their generous support of the Audiences Project:



4

Database and Box Office Technology: Work Plan Notes with Richard Carter

October 9, 2009

Early planning for our work on Database and Box Office systems, an essential preliminary to effective audience building. Creative Trust sponsored the registration of a number of companies to the 2010 Intix conference.

- Planning for demo session in early November – two companies – Theatre Manager is our first choice (but they are saying they are so booked with demos and conferences they can't do it until January 2010), TixHub and ShoWare (US based but a theatre in London Ontario is using them).
- Richard also noted info on the sessions planned for the Intix conference Jan 28-30, 2010 – new sessions/workshops are being added daily; Intix is \$500-725 for the entire conference although day passes are available for \$90 to \$5 for admission only to the vendors/trade show.
 - Lisa Middleton, Director of Audience Development & Analytics at Stratford Shakespeare Festival is giving a session on how the festival is using audience segmentation and values and impacts data to address their audiences and segment their data from the marketing down to customer service at the venues.
 - There will be a “hot topics” case camp style session – 15-20 minute presentations with Q and A on trends, new initiatives companies are reporting, success stories from members.
 - Sessions on: Finding, training and keeping volunteers with Scott from Luminato and reps from TIFF

- Dynamic Pricing (like airlines – the prices go UP the closer to the show) will have speakers from NY Symphony, RTH, and a venue in New Jersey
- Paperless Ticketing
- Access for patrons – best practices accommodating patrons at the venue and online/phone sales
- Social media
- Customer Service reps from TO Tix, Casino Rama and looking for a sports venue
- Online sales – security and privacy of customer data
- Go Green – greening venues – reps from the Air Canada Centre, CNE and an 8000 seat venue in Kansas that was constructed entirely of reclaimed materials and has its own wind turbine for powering the building
- 2nd Generations Sales – i.e. scalpers – how people are dealing with and coping with
- State of the concert industry with the booker for ACC and MLSE, Live Nation and record companies

Database and Box Office Technology: Summary of Situations

September 2010

Creative Trust tracked the situation, needs and progress of Creative Trust companies in acquiring Database and Box Office technology that met their needs.

Working Capital for the Arts and Outreach Companies

Company	Satisfied/Unsatisfied?	Box Office? Y/N/want	Current System	Want New System?	Attended Session 1	Attended Session 2	Attended Session 3	Timing	Notes on Situation
Buddies in Bad Times Theatre	Unsatisfied	yes	Manual box office system, online database	yes			X	Fall 10	All ticketing is done manually, data recorded on excel spread sheets and then given to Marketing/Development for their database. Want to move to a fully intergrated system but waiting until new AD is in place, will need to get funding, are in touch with their peers. Conversations and exploration to start this season; ideally would like to have new system installed before start of

									next season.
Kaeja d'Dance	Unsatisfied	no	Filemaker pro - Custom	yes				early 2011	Want to replace once finances allow. CT offered \$1000 towards purchase of a new system like Sumac. (Grant made, system purchased in 2011)
Opera Atelier	Unsatisfied	want	Donorworks, excel spreadsheets	yes	X	X		Spring 2010	Are evaluating new system possibilities. Applied to the Nov 09 Trillium deadline. Currently fundraising, subscribers, events, education databases exist separately. Would like ability to sell special event tickets internally. Grant approved: will prob move to Theatre Manager. (Upgraded in late 2010.)

Elmer Iseler Singers	Somewhat	no	Q Member	maybe	X				Had Income Manager, it was too big so moved to Q Member - online system out of Vancouver so tech support isn't the best - great for tracking sales, donations etc but hard to get the information out, merge donation letters/receipts and pull reports. They have about 2000 records. Will need a new service if Q Member closes.
Factory Theatre	Somewhat	yes	TixHub + Sumac	yes	X	X	X	Fall 09	Use TixHub, hard to get report/information out, no integration between donors, subscribers, production etc. Need to understand subscriber buying history to do prospecting; looking for a new system. Sumac on-site demo Oct 09; ordered system, being installed.
Lorraine Kimsa Theatre for Young People	Somewhat	yes	Audienceview Giftview	yes		X	X	early 2010	Current version of Audienceview is old - unless they upgrade Audienceview will no longer service them after Feb 2010. Development is using Giftworks which is not intergrated with

									box office.
Soundstreams	Somewhat	no	Income Manager	yes					Exploring options.
Théâtre français de Toronto	Somewhat	yes	various	yes	X		X	Jun-10	Have purchased Theatre Manager - system was adapted to French language. Dec 09 rec'd Trillium funding for transition. Installation and training to take place June 2010
Theatre Passe Muraille	Somewhat	yes	Matix	yes			X	summer 2010	Exploring options.
Toronto Children's Chorus	Somewhat	no	Raiser's Edge	?					Need staff training; very expensive with this system.
Ballet Jörgen Canada	Satisfied	want	Raiser's Edge	?	X				Need to do box office for Toronto self presents; upgrade, training will be expensive with this system.
Dancemakers	Satisfied	yes	Sumac				X	Fall 09	Staff needed further training on Sumac; completed Oct 2009.
Danny Grossman Dance Company	Satisfied	no	Access - Custom	no					

Esprit Orchestra	Satisfied	no	Sumac	yes	X			Fall 09	Sumac installed Fall 09.
Necessary Angel	Satisfied	no	Blackbook - Custom					Summer 09	Worked with developer to create custom online system (their version called Blackbook) for fundraising, marketing, contact management and box office records (sales handled by presenters). Wanted online system so they can access it from home or on tour. Installed in spring/summer 2009 and just finishing staff training now.
Nightwood Theatre	Satisfied	yes	TixHub		X			Fall 09	Also have Sumac and will keep it until sure they want to continue with TixHub
Tafelmusik Baroque Orchestra and Chamber Choir	Satisfied	yes	ProTix						
Tapestry New Opera Works	Satisfied	yes	Sumac		X				Got Sumac in 2006, have since added the sales extension pack so can sell tickets to shows in studio, events etc. they are very happy with it.

Tarragon Theatre	Satisfied	yes	Theatre Manager		X				Got Theatre Manager in 2008, very happy have offered to show others their RFP, Trillium application etc to aid in their transitions.
Theatre Direct	Satisfied	yes	Sumac					Fall 09	Sumac installed in September 09.
Toronto Dance Theatre	Satisfied	want	Sumac	yes		X		Fall 09	Sumac installed Nov 23, 2009; Feb 2010-love the new system!

Outreach/Stand Firm Companies

Company	Satisfied/Unsatisfied?	Box Office? Y/N/want	Current System	Want New System?	Attended Session 1	Attended Session 2	Attended Session 3	Timing	Notes on Situation
b current	Unsatisfied	no	excel spreadsheets	yes	X	X		early 2010	Will apply to the Nov 09 Trillium deadline; need an easy system as have many volunteers and interns using the system.
inDANCE	Unsatisfied	no	excel spreadsheets	yes					Campaign monitor also has a database feature for email blasts.
Little Pear Garden Collective	Unsatisfied		Filemaker pro - Custom	yes	X	X			With Dance Umbrella of Ontario - could possibly share with other clients?

Nathaniel Dett Chorale	Unsatisfied	no	donorworks, excel spreadsheets	yes	X	X	Before Summer 2010	Has donorworks which is large, cumbersome and complicated; staff needs training or new system. Need to track ticket sales and donors. Actively looking. Oct 09 booked appt w Sumac for on-site demonstration. Have determined which system they want to go with but are now looking for funds.
Nightswimming	Unsatisfied	no	excel spreadsheets	yes			Fall 09	Currently have an RFP out.
The Company Theatre	Unsatisfied	no	excel spreadsheets	yes			Fall 2010	Just investigating options now, know they need a change but need time and resources.
The Music Gallery	Unsatisfied	want	excel spreadsheets	yes	X	X	early 2010	Have many excel spreadsheets and hard files, new GM finding it hard to piece together information. Need for fundraising and production management data, would like to sell tickets; has CAHSP money they need to spend by Feb 2010. Sumac demo Oct 09.

The Theatre Centre	Unsatisfied	yes	excel spreadsheets	yes	X		X	Will need fundraising database for capital campaign and box office system in new space.
Ballet Creole	Somewhat	no						Exploring options.
Cahoots Theatre Projects	Somewhat	no	Sumac				Fall 09	Staff needs further training; they will arrange.
CanAsian Dance Festival	Somewhat	no	Filemaker pro - Custom					
Dance Umbrella of Ontario	Somewhat	no	Filemaker pro - Custom	yes	X	X		Have 21 clients; have filemaker to collect contacts, grant submissions and billable hours. Also have obligations to provide services to clients - in future could collect and house information for clients for a fee as revenue generation. No timeline.
Esmeralda Enrique Spanish Dance	Somewhat	no	Access - Custom	maybe	X			Either need a new system OR more training and personalization of existing system. Would like ability to sell special event tickets/smaller studio showings.
Fujiwara Dance Inventions	Somewhat	no	Filemaker pro - Custom					

Princess Productions	Somewhat	no	Salesforce	maybe	X	X			No permanent office so staff all work remotely therefore require webbased software/database they can all access no matter where they are.
STAF	Somewhat	no	Filemaker pro - Custom	maybe		X			Provide publicity and admin services for clients, would like to develop database service for clients like DUO above.
Studio 180	Somewhat	no	Filemaker pro - Custom	maybe	X	X		Fall 2010 or longer	Need to be able to track donations and fundraising, no electronic data prior to 2007.
Tribal Crackling Wind	Somewhat	no	Filemaker pro - Custom						
Dance Immersion	Satisfied	no	Sumac						
Menaka Thakkar Dance Company	Satisfied	no	Access - Custom		X				Working closely with Eddie Kastrau for all tech needs
Mixed Company	Satisfied	no	Sumac						
Obsidian Theatre Company	Satisfied	yes	Sumac						Just switched (Summer 2009) to Sumac from Donorworks
Rasik Arts	Satisfied	no	Sumac						

Audience Engagement Project Revised Budget

October 2, 2009

\$ Costs	Original Budget Yrs 1 & 2 combined	Program Cashflow			Revised Total Program Budget
		2009	2010	2011	
Databases and Box Office Systems					
Consultancy	\$8,000.00	\$3,000.00	\$2,000.00	\$ -	\$5,000.00
One-on-one followup \$1000 per organization x 4	\$11,750.00	\$1,000.00	\$3,000.00	\$ -	\$4,000.00
Subtotal	\$19,750.00	\$4,000.00	\$5,000.00	\$ -	\$9,000.00
Engaging Audiences: Action Learning Program with Alan Brown					
Alan Brown Consultancy, with Lynne Connor/Rob Evans	\$69,000.00	\$9,000.00	\$35,000.00	\$ -	\$44,000.00
Travel, per diem and accommodation	\$7,500.00	\$3,000.00	\$5,000.00	\$ -	\$8,000.00
GTA Audience Segmentation project, materials, analyst, honoraria	\$21,750.00	\$7,500.00	\$10,000.00	\$ -	\$17,500.00
Facility/refreshments and equipment rental	\$8,000.00	\$1,000.00	\$2,000.00	\$ -	\$3,000.00
Subtotal	\$106,250.00	\$20,500.00	\$52,000.00	\$ -	\$72,500.00
Diversifying Audiences: Seminars & Workshops with Donna Walker Kuhne					
Donna Walker Kuhne Consultancy	\$20,000.00	\$ -	\$10,000.00	\$10,000.00	\$20,000.00
Travel, per diem and accommodation	\$4,500.00	\$ -	\$3,500.00	\$1,000.00	\$4,500.00
Subtotal	\$24,500.00	\$ -	\$13,500.00	\$11,000.00	\$24,500.00
Technology and Techniques: Workshops (4 per year)					
Speaker/facilitators fees	\$12,000.00	\$2,000.00	\$4,000.00	\$ -	\$6,000.00
Facility/refreshments and equipment rental	\$9,000.00	\$1,000.00	\$2,000.00	\$ -	\$3,000.00

	Subtotal	\$21,000.00	\$3,000.00	\$6,000.00	\$ -	\$9,000.00
Salons (2)						
	Panelists fees, travel, per diem, accommodation	\$8,000.00	\$ -	\$3,000.00	\$1,900.00	\$4,900.00
	Facility/refreshments and equipment rental	\$4,800.00	\$ -	\$2,400.00	\$ -	\$2,400.00
	Subtotal	\$12,800.00	\$ -	\$5,400.00	\$1,900.00	\$7,300.00
Access Project:						
	Participant/facilitator fees and honoraria	\$45,000.00	\$ -	\$17,000.00	\$28,000.00	\$45,000.00
	Travel, per diem and accommodation	\$2,000.00	\$ -	\$2,000.00	\$-	\$2,000.00
	Equipment purchase	\$5,000.00	\$ -	\$5,000.00	\$-	\$5,000.00
	Video documentation and dissemination	\$8,000.00	\$ -	\$3,000.00	\$5,000.00	\$8,000.00
	Subtotal	\$60,000.00	\$-	\$27,000.00	\$33,000.00	\$60,000.00
Total Program Expenses		\$244,300.00	\$27,500.00	\$108,900.00	\$45,900.00	\$182,300.00
Sharing the Learnings						
Evaluation						
	Research and writing: Evaluation Reports, Newsletters, Case Studies	\$14,000.00	\$-	\$6,000.00	\$6,000.00	\$12,000.00
	Printing and distribution	\$6,000.00	\$-	\$2,000.00	\$2,000.00	\$4,000.00
Presentations: Sharing results with other communities						
	Preparation, presentation and followup 2 CT speakers x 2 per year	\$12,000.00	\$-	\$4,000.00	\$4,000.00	\$8,000.00
	Travel and expenses	\$5,000.00	\$-	\$2,500.00	\$2,500.00	\$5,000.00
	Subtotal	\$37,000.00	\$-	\$14,500.00	\$14,500.00	\$29,000.00
Administration and Communications						
	Program development	\$20,000.00	\$10,000.00	\$10,000.00	\$-	\$20,000.00
	Program administration, coordination and overhead	\$80,000.00	\$20,000.00	\$40,000.00	\$20,000.00	\$80,000.00
	PAONE program development and consultant fees	\$10,000.00	\$2,500.00	\$2,500.00		\$5,000.00
	Learning materials, books, copies etc	\$6,000.00	\$1,000.00	\$3,000.00	\$2,000.00	\$6,000.00

Registration and material preparation		\$4,000.00	\$1,000.00	\$2,000.00	\$1,000.00	\$4,000.00
Website: including new Audiences and Arts Education area, podcasts		\$8,700.00	\$600.00	\$3,000.00	\$2,000.00	\$5,600.00
	Subtotal	\$128,700.00	\$35,100.00	\$60,500.00	\$25,000.00	\$120,600.00
	Total Expenses	\$410,000.00	\$62,600.00	\$183,900.00	\$85,400.00	\$331,900.00

			confirmed			
			/pending			
Ontario Arts Council	p	\$100,000.00	\$25,000.00	\$35,000.00	\$-	\$60,000.00
Canada Council Arts Promotion Office	p	\$100,000.00	\$-	\$20,000.00	\$20,000.00	\$40,000.00
CSIF Program Ministry of Culture	c	\$25,000.00	\$20,000.00	\$25,000.00	\$-	\$45,000.00
City of Toronto Economic Development Department	c	\$40,000.00	\$20,000.00	\$20,000.00	\$10,000.00	\$50,000.00
Sunlife Financial	c	\$60,000.00	\$-	\$27,000.00	\$33,000.00	\$60,000.00
TD Financial Group	c	\$50,000.00	\$20,000.00	\$30,000.00		\$50,000.00
Creative Trust Contribution	c	\$32,000.00	\$-	\$25,000.00	\$2,000.00	\$27,000.00
	Total Revenues	\$407,000.00	\$85,000.00	\$182,000.00	\$65,000.00	\$332,000.00
	Annual Expenses less Revenues	\$(3,000.00)	\$22,400.00	\$(1,900.00)	\$(20,400.00)	\$100.00
	Balance	\$(3,000.00)	\$22,400.00	\$20,500.00	\$100.00	

Audience Engagement: An Action Learning Program Facilitated by Alan Brown

An overview of proposed work on Engaging Audiences with Alan Brown.

Overall Goal

The purpose of the Engaging Audiences program is to assist Creative Trust constituent groups in designing and planning programs and activities, both individually and collectively, that deepen the impact of the audience experience and stimulate attendance among target audience segments.

Program Outline

Phase 1: Audience Engagement – A Close Examination

The program will kick off with a day-long seminar focusing on the topic of audience engagement. The learning objectives are to expand everyone’s perspective on the benefits and challenges of audience engagement practices, and to develop a number of new ideas for engaging audiences. Some possibilities for this program include:

- A discussion with by Lynne Connor, author of “In and Out of the Dark: A Theory of Audience Behavior from Sophocles to Spoken Word.”
- Panel presentation on exceptionally promising new audience engagement practices (Canadian and U.S. resource people; perhaps Ron Evans can focus on web-based engagement practices)

- A presentation by Alan Brown on existing research on audience preferences for engagement
- A session of “Speed Dating Roundtables” focusing on new or emerging engagement practices (participants rotate around a circle of themed tables, spending 10 minutes at each table; each table is hosted by an arts practitioner who is working on a specific form of audience engagement); this is, essentially, an idea generation exercise
- A facilitated brainstorming session devoted to conceptualizing new approaches to audience engagement, including new approaches to stimulating trial amongst new audiences [modeled on Alan’s recent session with Annenberg Center staff]
- A debate about the role of interpretive assistance in arts experiences, with someone arguing that “art speaks for itself and needs no mediation or embellishment” and someone else arguing that “audiences increasingly need help interpreting art”

Phase 2: Survey of Engagement Preferences

This phase of the program involves primary data collection on a cross-section of audiences. The learning objective is to provide participating arts groups with relevant data on how their own audiences feel about engagement activities. Alan will design a survey to investigate audiences’ overall attitudes towards engagement and their preference levels for specific engagement practices. Several versions of the survey will be designed to be applicable to different art forms. While Alan will design the surveys, someone else (perhaps a gradate student?) will need to coordinate data collection and produce topline reports for each arts group that produces enough responses (e.g., a minimum of 100 responses may be the threshold). The arts groups themselves will actually broadcast the emails to invite their audience members to take the survey. This is conceived as a “quick and dirty” survey effort, without a professional quality research report deliverable. The survey will be timed with the

interviewing exercise (see below) such that the survey can also serve as a means of recruiting individual audience members to be interviewed.

Phase 3: Participatory Interviewing Exercise

Alan will design and facilitate two intensive cycles of individual in-depth interviews with audience members. This is a participatory research exercise designed to build a shared understanding of audience members' values and motivations, and how they like to engage with the art. Two representatives from each arts group will form a team, alternating in the roles of interviewer and recorder. All materials and training will be provided. Participants should expect to learn about interviewing techniques, contribute to the learning by conducting four interviews and debriefing immediately afterwards, and gain a deeper understanding of what motivates audiences and how they want to engage. Each cycle takes place over a two day period, with the following approximate schedule:

Friday (Day 1)

2:00 p.m.	Orientation and training session (large conference room); Alan talks through the exercise, reviews the roles of the Interviewers and Recorders, and takes questions.
3:30 p.m.	Practice interview (team members take turns interviewing each other, to break the ice)
4:30 p.m.	Break
5:00 p.m.	First interview (60 minutes)
6:00 p.m.	Quick debrief with your partner
6:15 p.m.	Break (dinner provided in conference room)

7:00 p.m. Second interview (60 minutes)
8:00 p.m. Quick debrief with your partner
8:15 p.m. Break for the night

Saturday (Day 2)

9:00 a.m. Reconvene (light breakfast provided)
9:30 a.m. Third interview (60 minutes)
10:30 a.m. Quick debrief with your partner
11:00 a.m. Fourth interview (60 minutes)
12:00 p.m. Quick debrief with your partner
12:15 p.m. Lunch provided
12:30 p.m. Synthesis session facilitated by Alan
2:30 p.m. Wrap-Up

Given the number of Creative Trust groups, we'll probably need to do two cycles, separated two weeks, so that we don't have more than ten teams of two people working simultaneously. Otherwise, the exercise gets unwieldy. We'll have to work out the details of pairing interviewers with interviewees such that representatives of theatre organizations, for example, interview theatre attendees. The deliverable is the PowerPoint file with notes from the synthesis sessions, delivered immediately after each session.

A great deal of coordination work will be required of Creative Trust staff (i.e., recruiting the teams of interviewers, recruiting audience members who indicate on the survey that they'd like to be interviewed, making facility and catering arrangements, etc.). Interviewees will be compensated \$50 for being interviewed.

Alan has led numerous interviewing exercises in this format. It is a time intensive but very fulfilling experience for the participants. The learning they take away can have a major impact on their daily work.

Phase 4: Creative Summit

The program will culminate with a creative summit – an intensive exercise during which teams of three or four arts leaders develop solutions to carefully crafted assignments relating directly to their daily work. Prior to the exercise, all participants will be expected to read one or more audience segmentation studies. Two concurrent tracks are envisioned:

- Track 1: Marketing directors and/or managing directors will focus on audience development assignments, such as designing packages for specific audience segments;
- Track 2: Artistic directors will focus on designing audience engagement strategies. Whenever possible, the group exercises will draw on actual programs being planned for next season, so that the exercise are “real” and not just hypothetical.

At the end of the exercise, the groups will present their solutions to each other. All participants will be free to use any of the ideas generated as part of this exercise (i.e., the intellectual property will be a shared resource).

Alan has previously designed and facilitated several Creative Summits, most recently for the CCI/Ontario Presenters group. Generally, this is a two and a half day affair. The agenda for the

original Creative Summit designed for the Major University Presenters consortium is attached for reference.

Approximate Cost Estimates

Following are approximate fee estimates for each of the four phases of work, exclusive of travel expenses. There are many assumptions underlying these figures, but they should give you a general sense of the financial resources that would be necessary to undertake a program like this. We are very open to your suggestions for modifying the program scope in order to accomplish your budget objectives.

Phase 1: Audience Engagement Seminar\$_____

Includes session design, agenda development, one site visit (two days)

Phase 2: Survey of Engagement Preferences\$_____

Includes survey design, coaching and support on data collection and reporting, but assumes that a local resource person will be responsible for coordinating data collection with the various arts groups; includes basic data file preparation; assumes a local resource person with SPSS experience will produce topline reports for each group; includes a summary PowerPoint presentation on aggregated results. Assumes some level of non-technical support from Creative Trust staff.

Phase 3: Participatory Interviewing Exercise\$_____

Includes session design, protocol development, two site visits (three days each, Alan Brown and Rebecca Ratzkin) to lead the two cycles of interviews; assumes a high level of logistical

support from Creative Trust staff (e.g., full-time support for several weeks leading up to the exercises).

Phase 4: Creative Summit\$_____

Includes agenda development, design of the small group assignments, advance coordination with Creative Trust staff, one site visit (four days, Alan Brown and Rebecca Ratzkin); assumes a high level of logistical support from Creative Trust staff (e.g., full-time support for several weeks leading up to the summit).

These fees are subject to change based on further discussions. Travel expenses and hotel accommodations are not included. Other expenses associated with meeting costs (room rental, catering, etc.) would be additional.

Audience Engagement: A Close Examination Workshop

December 10, 2009

Agenda for an early workshop with our audience engagement mentor, Alan Brown.

Learning Objectives

- Expand participants' perspectives on the benefits and challenges of audience engagement practices
- Encourage experimentation and help to create partnerships around specific engagement practices
- Send participants home with new ideas for engaging their audiences

Recommended Advance Reading

To prepare, please read Lynne Conner's essay "In and Out of the Dark: A Theory of Audience Behavior from Sophocles to Spoken Word." You'll have a chance to question Lynne during the morning.

AGENDA

- 8:30 a.m. Coffee and sign-in
- 9:00 a.m. Frameworks for Audience Engagement

A two-part presentation by Alan Brown:

- Part 1: How should we define ‘engagement?’ Why is the cultural sector paying attention to engagement? What does research tell us about how audiences want to engage? Alan will present new research on how audiences engage with dance, theatre and classical music.
- Part 2: Sculpting the experience: A framework for thinking about audience engagement, including an overview of new engagement practices and a video contribution from Hannah Rudman from the U.K.

11:15 a.m. Break

11:30 a.m. Panel: “Ladies and Gentlemen, Please Turn On Your Cell Phones” - A Discussion about the Future of Audience Engagement

As a field, we are grappling with serious issues surrounding the sanctity of the audience experience. What are the limitations of audience interaction and engagement during arts experiences? Are we undermining the art forms by inviting audience members to Tweet? Does art speak for itself, needing no mediation or embellishment, or should we provide more and more interpretive assistance? This lunch program will feature two or three prominent artists or artistic directors with different viewpoints on the topic. Each will present about 10 minutes of prepared remarks, followed by a moderated discussion.

Panelists: **Guy Mignault**, Artistic Director, Theatre Francais de Toronto; **Sedina Fiali**, Outreach Manager, b current, **Jacob Zimmer**, Resident Dramaturge/Animateur, Dancemakers

12:30 Lunch Break [45-minutes]

Afternoon: Practice

1:15 p.m. Idea Generation Exercise

The goal of this session is to prioritize a short list of engagement practices that people most want to talk about and implement. Then, we'll ask everyone to identify three practices that they're most interested in talking about. Shana will assign people to breakout rooms based on their preferences.

2:15 p.m. Rapid Roundtables

2:15 – 2:35 – Rotation #1

2:40 – 3:00 – Rotation #2

3:05 – 3:25 – Rotation #3

Three rotations of 20 minute roundtable discussions will provide participants an opportunity to discuss three specific ideas with colleagues. Each room/topic will be hosted by someone with some experience in the practice. Roundtable hosts will keep the discussion moving and keep lists of people who'd like to continue the discussion afterwards.

3:30 p.m. Break (15 minutes)

3:45 p.m. Panel Discussion: Shut Up, Sit Down; Get Out, Go Home

Our facilities present both challenges and opportunities with respect to engagement. This panel discussion will examine the role of facilities in creating engaging experiences (both socially and artistically), and how we might make more creative use of facilities to accomplish engagement goals. The session will begin with a conversation with Lynne Conner, author of “In and Out of the Dark,” via a Skype video link.

Panelists: **Lynne Conner** (via Skype), **Franco Boni**, Managing Artistic Director, The Theatre Centre; **Lynda Hill**, Artistic Director, Theatre Direct Canada

5:00 p.m. Wrap-Up: What Ideas Are You Taking Home?

Alan will moderate a final segment devoted to reflecting on what people learned during the day and what engagement activities they might explore moving forward. A component of this might be identifying sub-groups of people who would like to work collaboratively on specific engagement practices.

To close, Jini will talk about the subsequent stages of the Engaging Audiences initiative.

Audience Engagement Survey Protocol (with notes)

A draft of the Protocol for our Survey of the audience engagement preferences of 3,600 Creative Trust audience members; the Survey is attached as an addendum to this Tool Kit.

Learning Objective

The learning objective is to provide participating arts groups with relevant information on how their own audiences feel about engagement activities, with the hope that this information will assist them in formulating future engagement programs.

Methodology

Data collection will take place exclusively online. A separate version of the online survey will be launched for each participating group, so that responses can be tracked separately. Participating groups will send their email lists to Shana at the Creative Trust so that the email lists can be de-duped. Then, each group will receive back a de-duped email list as well as language for two email blasts: 1) an initial email requesting cooperation with the survey, and 2) a follow-up reminder/thank you email. It will be the responsibility of the participating groups to send out the emails according to the timeline.

[Kelly: Is a separate version necessary for each participating group? The responses could be allocated to each organization based on the respondents' answers to the first question (the list of all organizations participating in the study). In this scenario, the respondents would not "belong" to a specific group, but the email lists would still need to be de-duped.]

[Alan: Technically, no. We don't absolutely need to launch separate surveys. However, if we don't, we won't be able to track response rates by organization, and we won't really know who's sent out their emails and reminder messages. We also would lose the ability to know what percentage of respondents came from the organization's list vs. crossed over from other lists. But it sure would simplify things if we didn't have to re-launch surveys for everyone. Let's discuss further.]

Protocol Design Approach

A standard protocol will be designed, and then customized to each discipline (dance, music, theatre, opera). Finally, individual protocols for each participating organization will be customized.

Email Recruitment Messages

Initial Recruitment Message

Subject Line: Special Request from [Name of Organization]

Dear Friend,

Would you take a few minutes to participate in an important study of Toronto arts audiences?

Our organization is a partner with the Creative Trust in a groundbreaking study of how audiences like to engage with art. Your responses will help us – and many of Toronto's performing arts groups – understand the changing expectations of audiences.

At the end of the survey, you may opt to receive a copy of the resulting research report, when it is released later in the year.

To take the survey, [\[click here\]](#).

Sincerely,

[Name of Sender]

P.S. If the hyperlink above is not active, please cut and paste this URL into your browser:

[insert Zoomerang URL]

Reminder/Thanks Message (to be sent 7 days after the initial message to the entire list)

Subject Line: Special Note of Thanks

Dear Friend,

Several days ago, I wrote you to request your cooperation with an important survey of Toronto arts audiences.

I'm pleased to say that the response has been strong, and would like to extend my sincere thanks to all of you who took the time out of your busy lives to complete the survey.

However, we are still in need of about 50 more responses, in order for our organization to be fully represented in the report.

May I ask again that you consider taking the survey, if you have not already done so?

To take the survey, [\[click here\]](#).

Sincerely,

[Name of Sender]

P.S. If the hyperlink above is not active, please cut and paste this URL into your browser:

[insert Zoomerang URL]

Annotated Protocol

Welcome/Survey Landing Page

Thank you for participating in the Toronto Audience Study. Your responses are confidential and anonymous. The survey takes about 10 minutes to complete. At the end of the survey, you may elect to receive a free electronic copy of the survey report when it is released later in 2010.

Let's get started...

Protocol

First, please type in your email address in the box below. This must be the same email address at which you received the invitation to take the survey. We ask this only to verify that you are an eligible respondent.

[One line comments box]

To begin, please indicate if you have attended programs offered by any of the following organizations over the past two years. This is a list of all the organizations that are participating in this study. (select all that apply)

[List of all 35 groups participating in the study. If necessary, we can break up the list into two or three chunks, perhaps categorized by discipline, to reduce the length of the list.]

[Note: Since most respondents will have attended more than one organization's programs, this question will allow us to identify the universe of respondents who have attended a given organization's programs over the past two years, regardless of what email list they came from.]

Next, please tell us all the different ways that you participate in [music/dance/theatre/opera]. (select all that apply)

[Note: this question investigates the broader spectrum of involvement in the art forms, and provides indicators of latent demand and past or 'dormant' interests. The overall goal here is to assess the extent to which audiences are also involved in other modes of participation with the art form. This data will not be available on all respondents associated with a given organization, since they will only complete the question in reference to the one discipline associated with the organization on whose list they appear.]

With whom do you attend [music/dance/theatre/opera] performances most commonly? (select all that apply)

[Note: This question provides basic information about social context of attendance.]

People go to [music/dance/theatre/opera] performances for many reasons. From the list that follows, please choose the three most important reasons why you attend [music/dance/theatre/opera]. (choose three only)

[Note: This question investigates motivations for attending. Results will be compared across disciplines, age cohort, etc. Additionally, we will look for underlying dimensions or ‘factors.’]

How much preparation do you like to do, typically, before attending [a concert/a stage play/a dance performance/an opera]? (For example, some people like to seek out information about the artist or works to be performed, attend a rehearsal or lecture about the program, etc.)

Scale: 1=None, 2=Just a bit, 3=A moderate amount, 4=A Lot

[Note: This is a generalized question meant to identify the extent to which someone is a preparer.]

What is your level of interest in doing the following preparatory activities before a [music/dance/theatre/opera] performance?

Scale: 1=No Interest, 2=Low interest, 3=Moderate interest, 4=High Interest

[Note: Here we investigate interest in doing a number of specific preparatory activities, both self-guided and facilitated. Are there other activities to add to, or subtract from, these lists? For analysis purposes, we’ll compute an aggregate score indicating interest in pre-performance engagement.]

How much do you agree with each of the following statements? (select a number for each)

Audience members should not do anything but sit quietly and watch or listen attentively during performances

Audience members should be allowed to participate, react and interact during performances

Response Options:

1=Strongly Disagree

2=Disagree

3=No opinion

4=Agree

5=Strongly Agree

[Note: This question explores attitudes about the ‘sanctity’ of the live performance. It will be especially interesting to look at these results by age cohort.]

Some people enjoy vigorously discussing the program immediately after the performance, while others prefer to reflect quietly on their own. Which do you prefer? (select a number)

Single Answer Options:

Reflect Privately

Discuss Vigorously

Both

No Preference

[Note: This question addresses how people prefer to ‘process’ the experience afterwards.]

**What is your level of interest in doing the following activities after a
[music/dance/theatre/opera] performance?**

Scale: 1=No Interest, 2=Low interest, 3=Moderate interest, 4=High Interest

[Note: Here we investigate interest in doing a number of specific post-performance engagement activities, both self-guided and facilitated. Are there other activities to add to, or subtract from, these lists? For analysis purposes, we'll compute an aggregate score indicating interest in post-performance engagement.]

Audience Engagement Survey: Summary Power Point Presentation

Presented by Alan Brown and Kelly Hill

June 24, 2010

Agenda

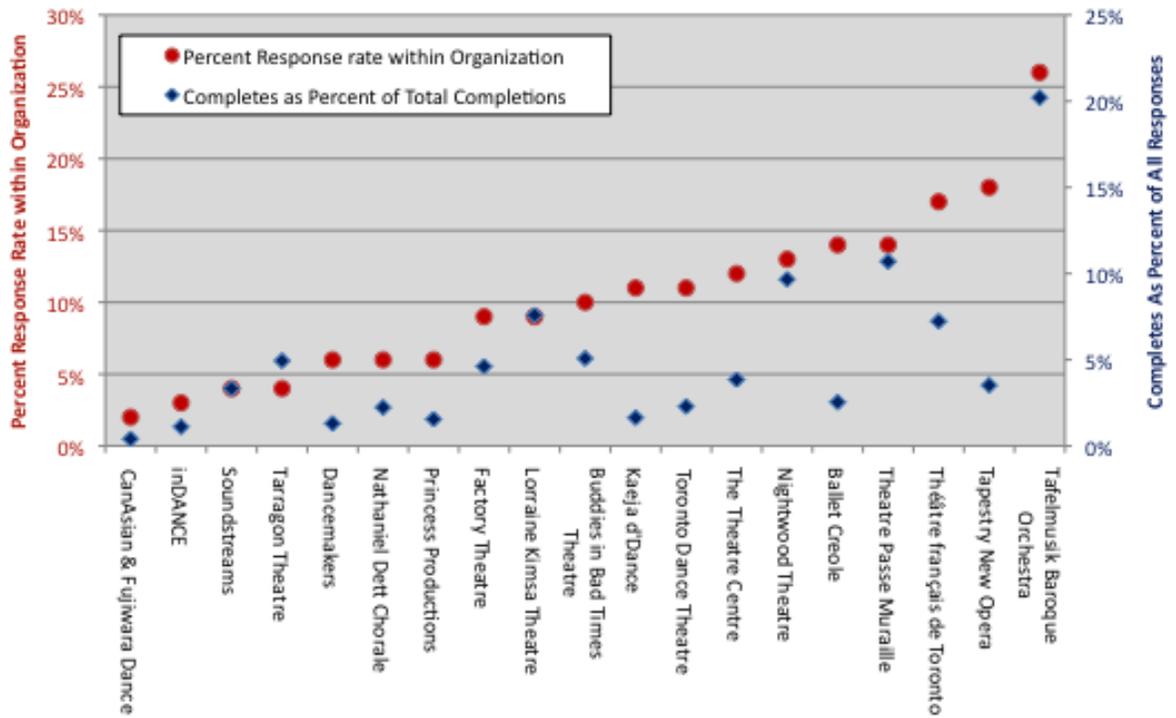
- 1:00 Process Lessons (Kelly Hill)
- 1:20 Summary Presentation (Alan Brown)
- 2:15 Key Themes & Observations (groups)
- 3:15 - Break -
- 3:30 Small Group Breakouts (45 minutes)
- 4:15 Report-Backs/Take-Home Ideas
- 5:00 Wrap-Up and Next Steps

Methodology & Process Lessons

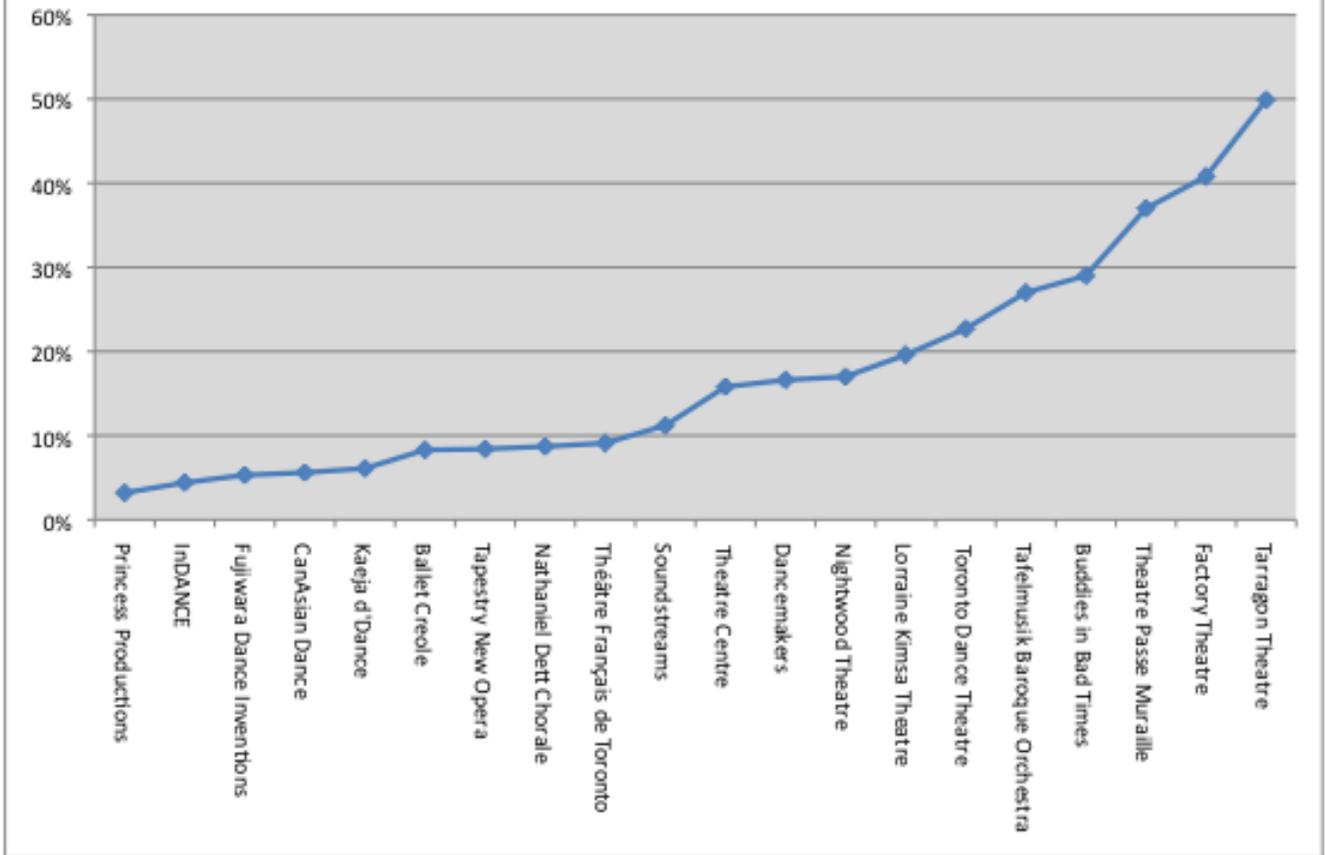
Methodology

- 20 participating groups across four disciplines
- The survey was designed to yield comparable results across the disciplines
- Online survey administration only
- Email address files were collected and de-duped
 - Individual groups were responsible for broadcasting their own emails
 - Some bias may be associated with online administration
- A total of 3,662 responses were received
- Reports with individual results were delivered last week

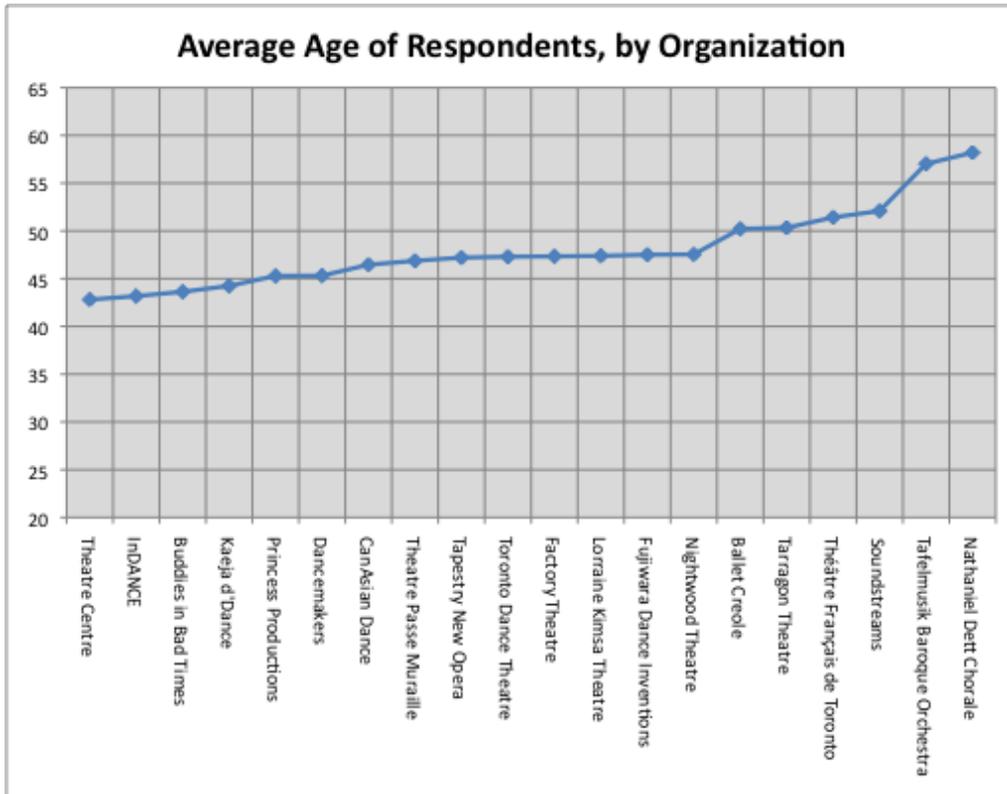
Response Rates and Percent of All Responses, by Organization



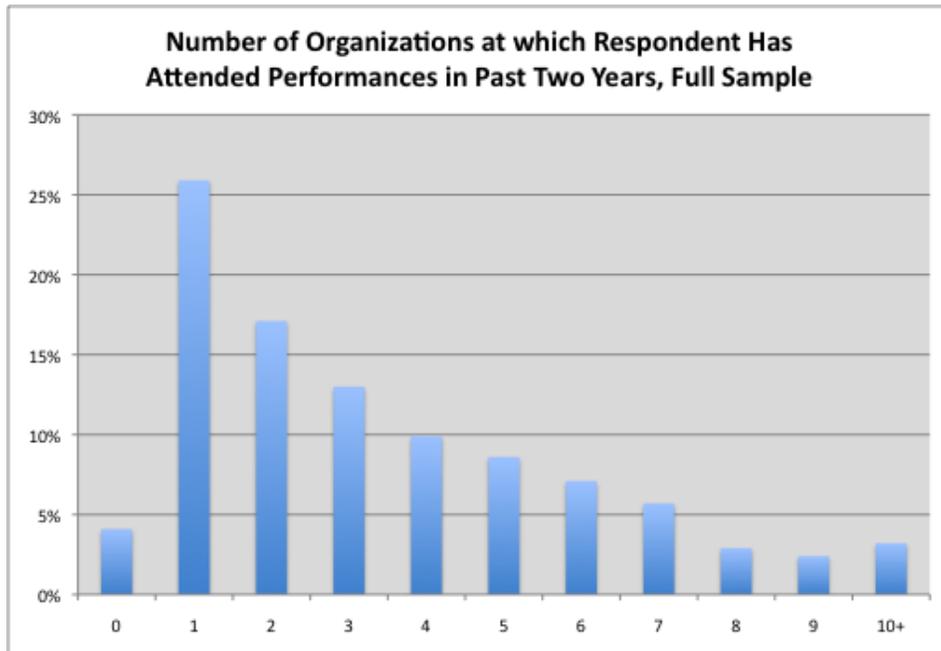
Percent of Respondents Who Reported Attending Each Organization, Total Sample



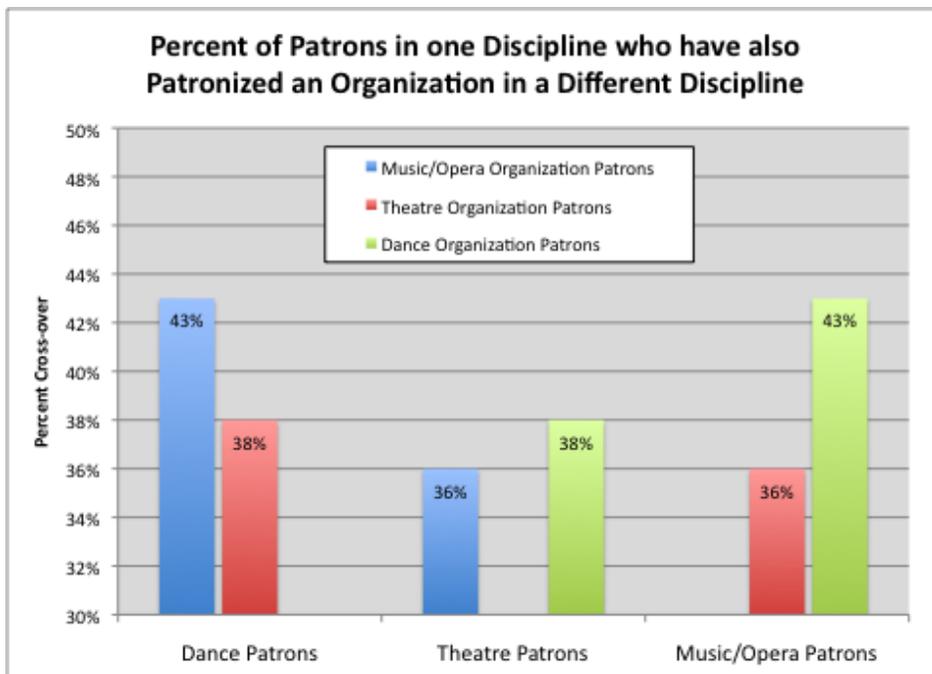
DEMOGRAPHICS		Total Sample (n=3,662)	Dance (n=436)	Music and Opera (n=1,150)	Theatre (n=2,076)
Artistic Income					
Earn portion of income from art performance or creation	32%		49%	25%	30%
Gender					
Female	69%		71%	63%	72%
Male	31%		29%	37%	28%
Average Age		50	46	58/52	47
Under 35	21%		25%	9%	24%
35-49	29%		35%	19%	31%
50-64	33%		30%	40%	30%
65+	18%		9%	32%	15%
Marital Status					
Married or partnered	61%		57%	64%	61%
Previously married or partnere	16%		19%	18%	16%
Single/never married	23%		25%	17%	23%
Children under 18 at home					
No	78%		80%	86%	75%
Yes	22%		20%	14%	25%
Occupational Status					
Working full-time	56%		62%	51%	57%
Working part-time	20%		21%	18%	20%
In school full-time or part-time	6%		6%	5%	7%
Not working	3%		2%	2%	3%
Full-time family caregiver	3%		3%	2%	4%
Retired	19%		14%	28%	17%



A good amount of Crossover was observed



Between 36% and 43% of all patrons cross-over between disciplines

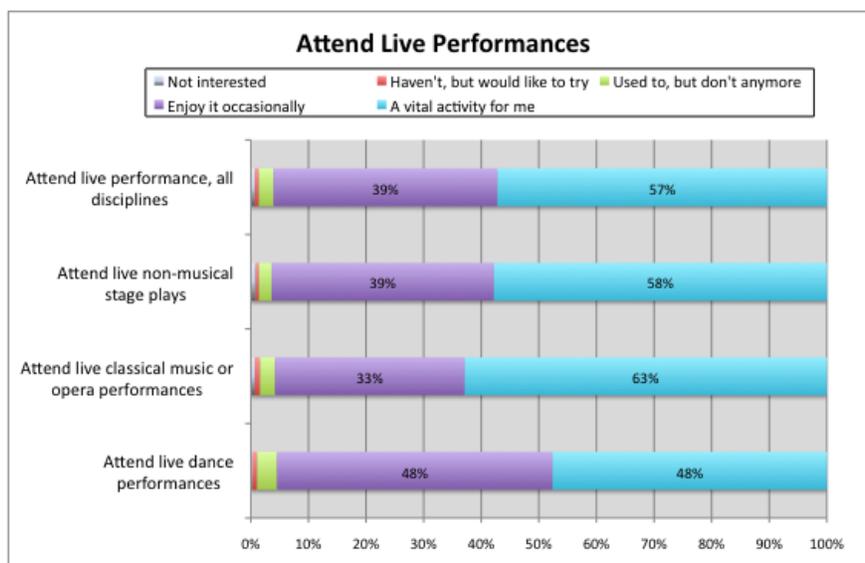


Participation Profiles

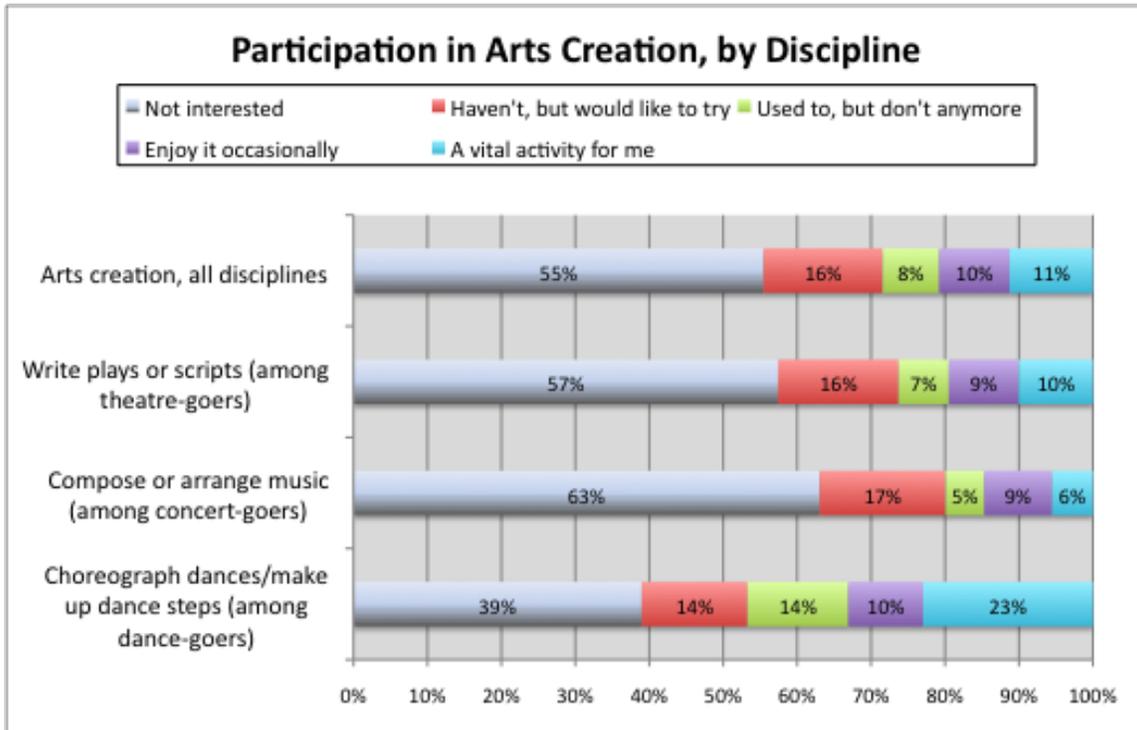
Five Modes of Arts Participation, Based on the Level of Creative Control

- Inventive Participation engages the mind, body and spirit in an act of artistic creation that is unique and idiosyncratic, regardless of skill level.
- Interpretive Participation is a creative act of self-expression that brings alive and adds value to pre-existing works of art, either individually or collaboratively.
- Curatorial Participation is the creative act of purposefully selecting, organizing and collecting art to the satisfaction of one's own artistic sensibility.
- Observational Participation occurs when you see or hear arts programs or works of art created, curated or performed by other people.
- Ambient Participation involves experiencing art, consciously or unconsciously, that you did not select.

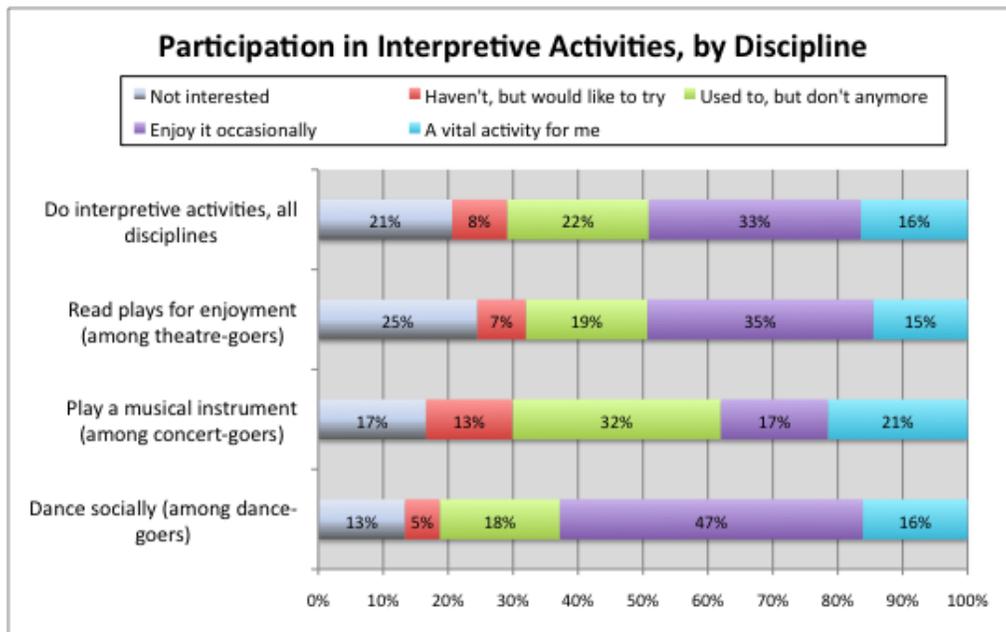
A majority consider going to live performances “a vital activity”



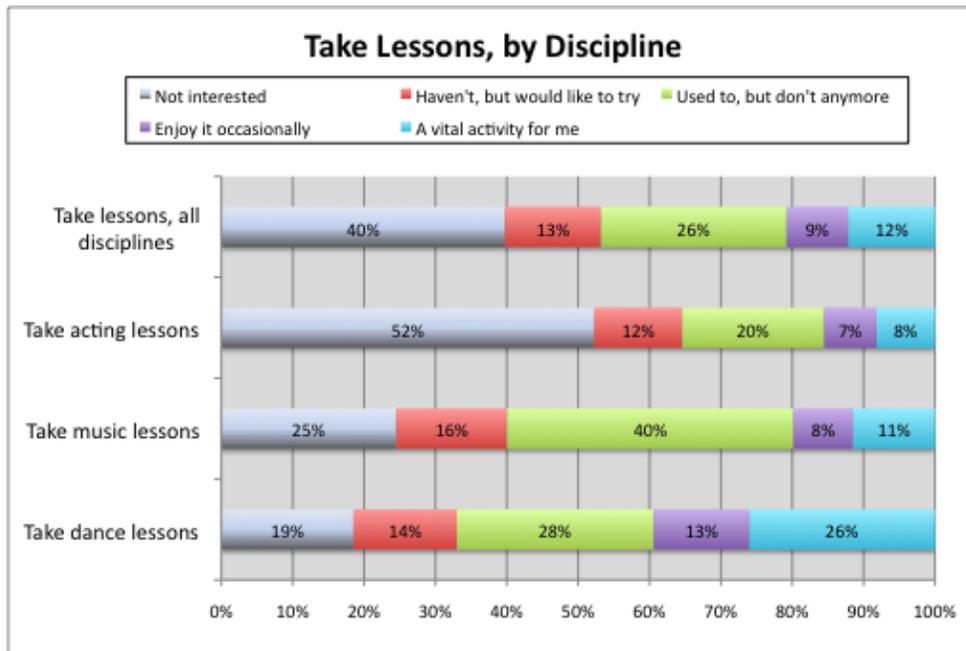
Dance audiences are most likely to be active in the inventive mode of participation



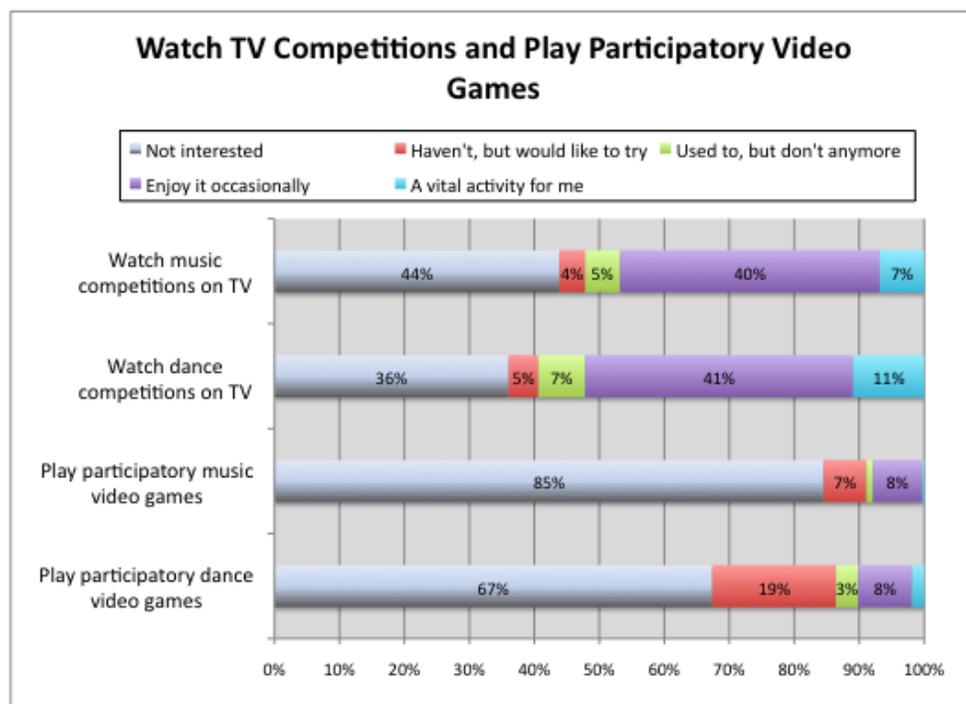
A large number of music patrons have active music participation in their past



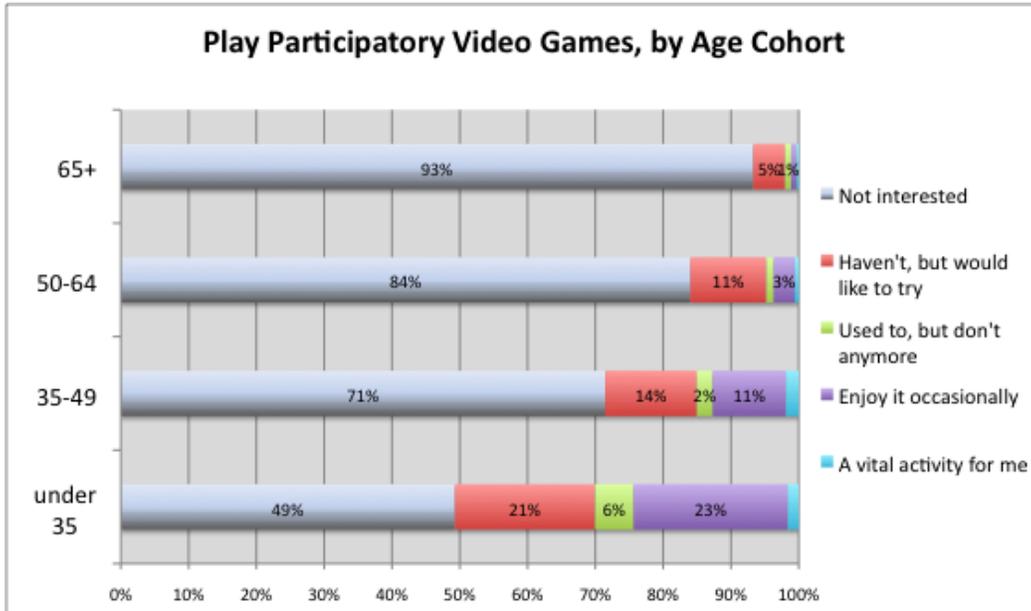
Three out of five music patrons can probably read music; nearly half of dance-goers can dance



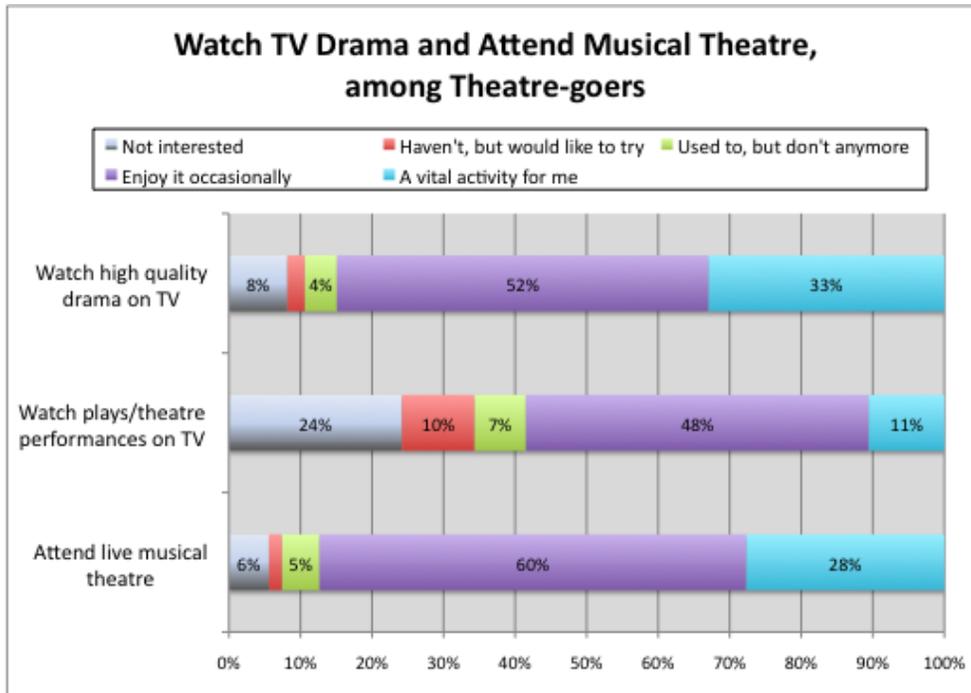
A majority of dance patrons are watching the dance competitions on TV



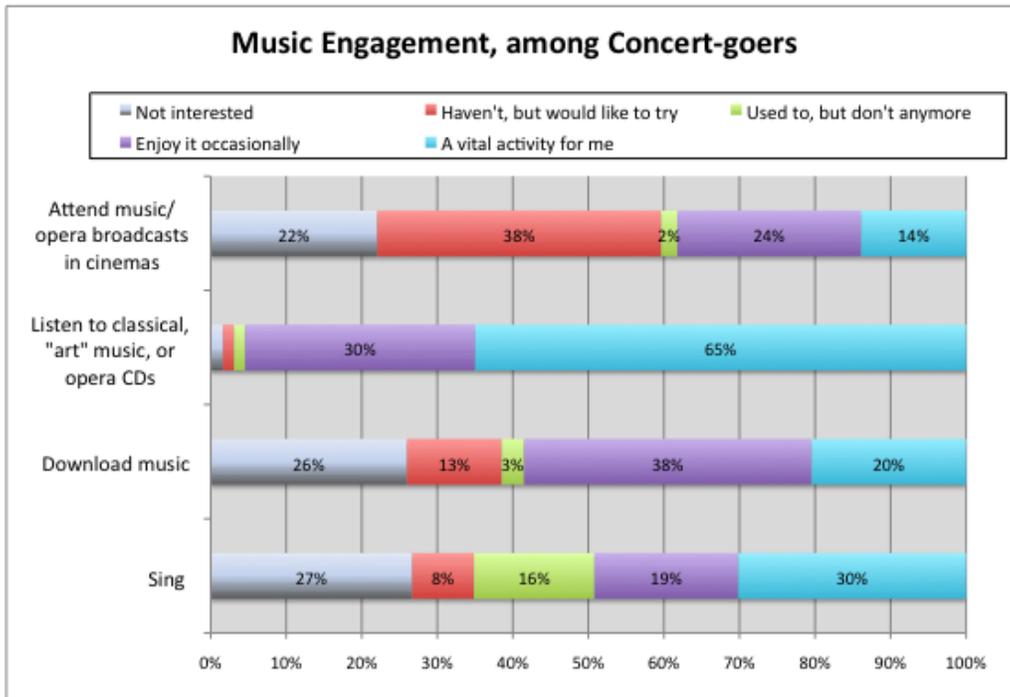
Note the close correlation between age and involvement in participatory video games



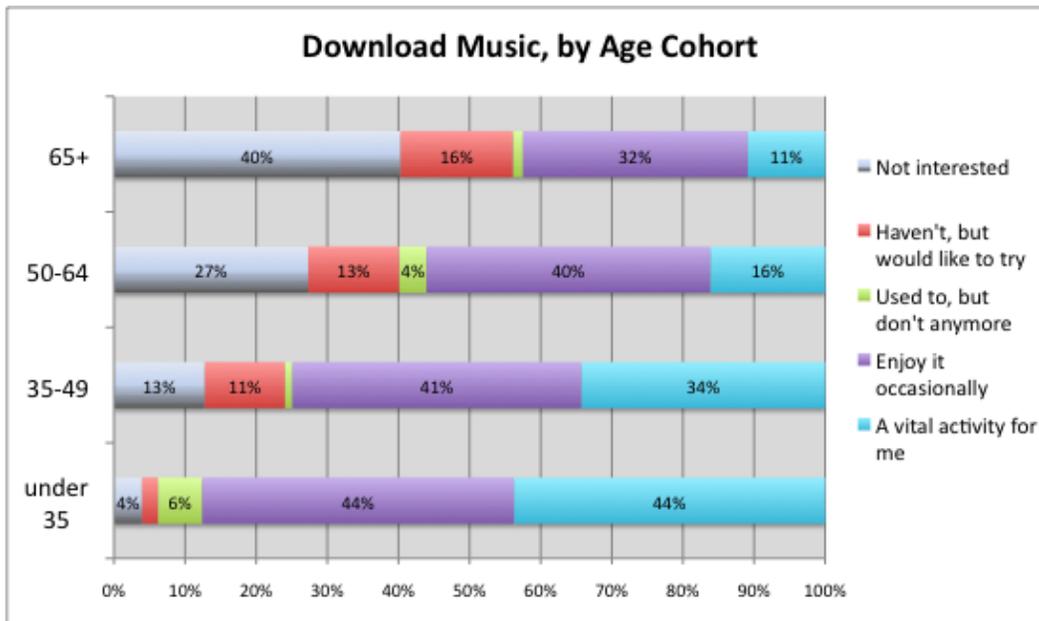
Television is a key medium of drama participation, among theatre-goers



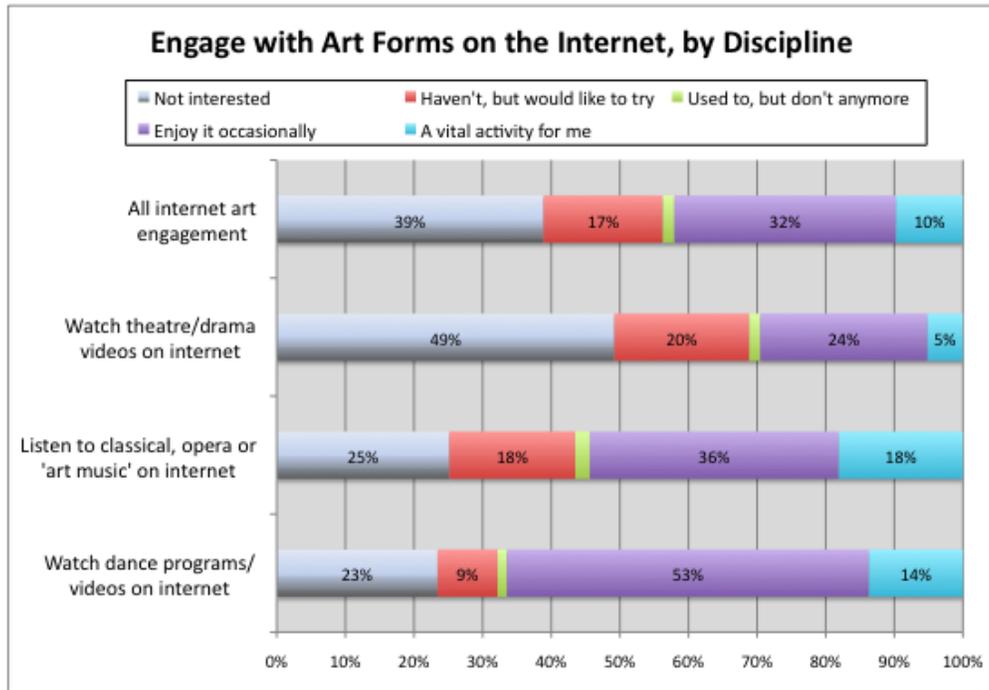
Concert-goers sustain their interest in music by listening to recordings



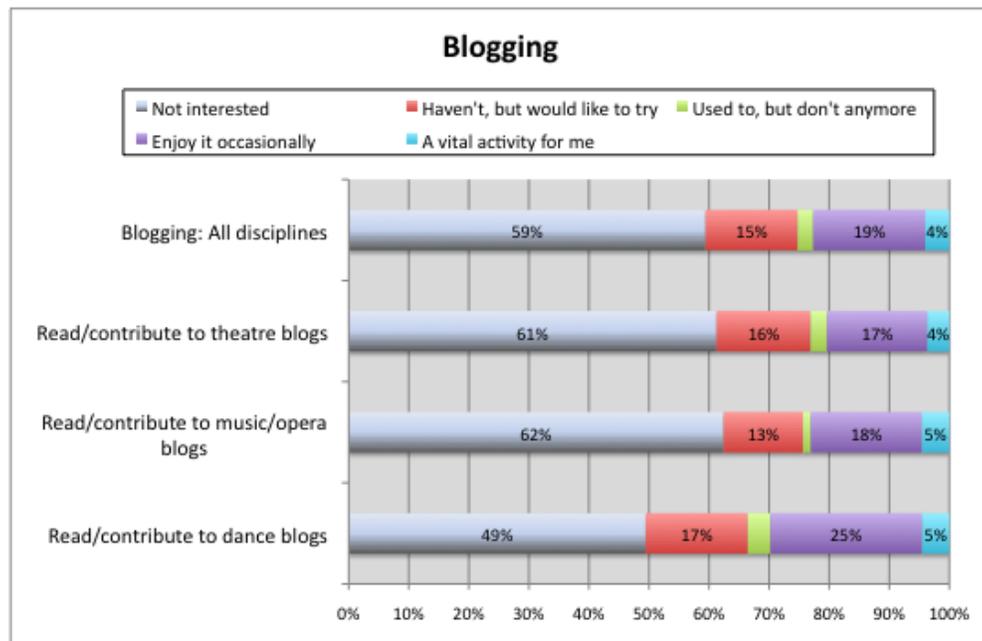
Curatorial participation in music is highly correlated with age



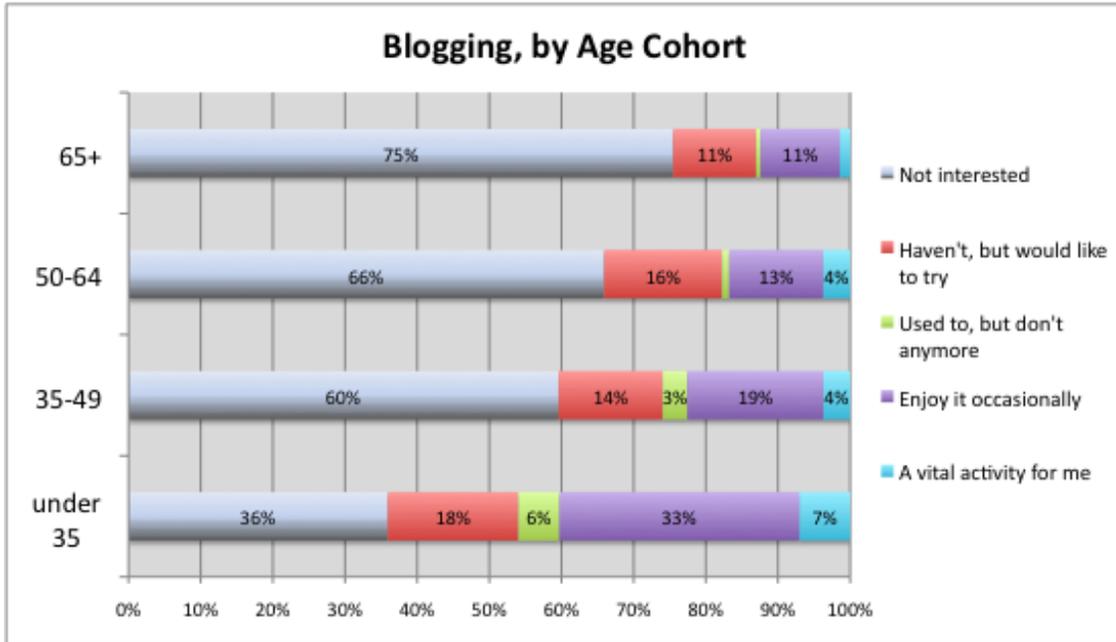
A lot of people are consuming music and dance on the Internet



Blogging (reading or writing) is an occasional activity for about one in five patrons

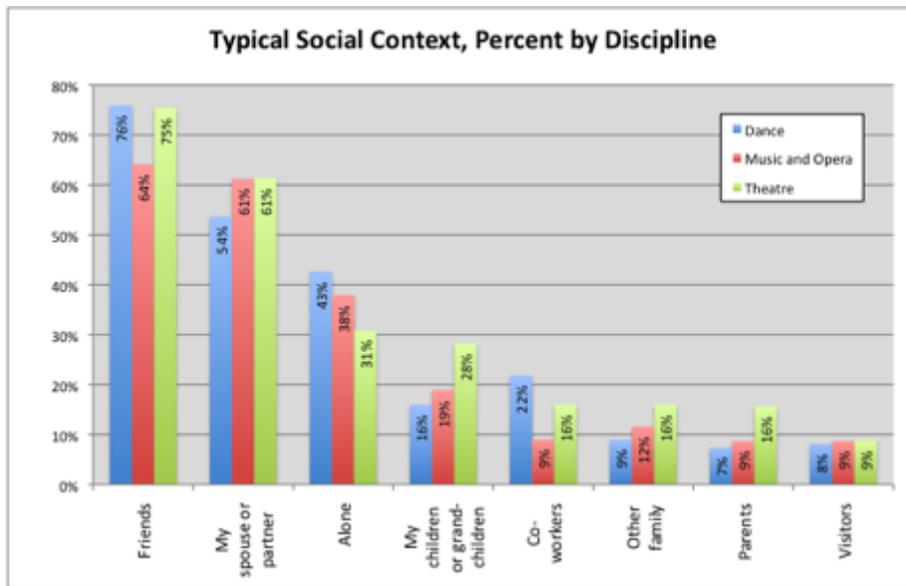


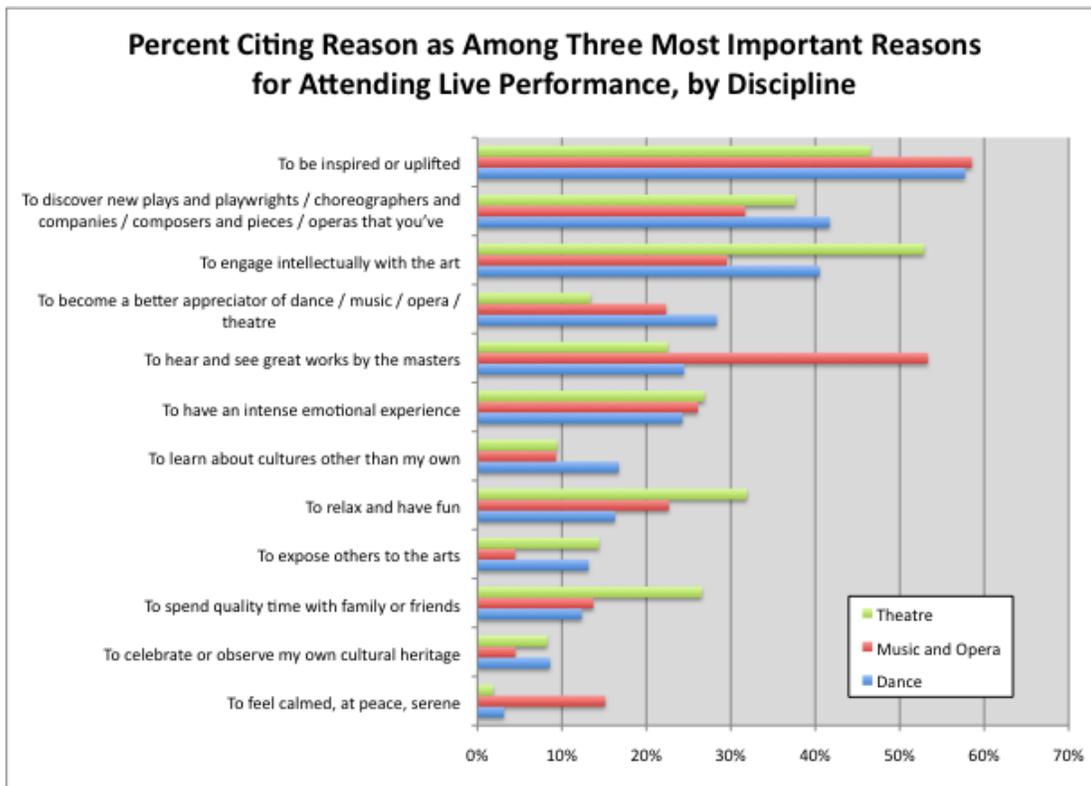
...and of course, blogging behavior is more prevalent amongst younger patrons



Social Context, Motivations

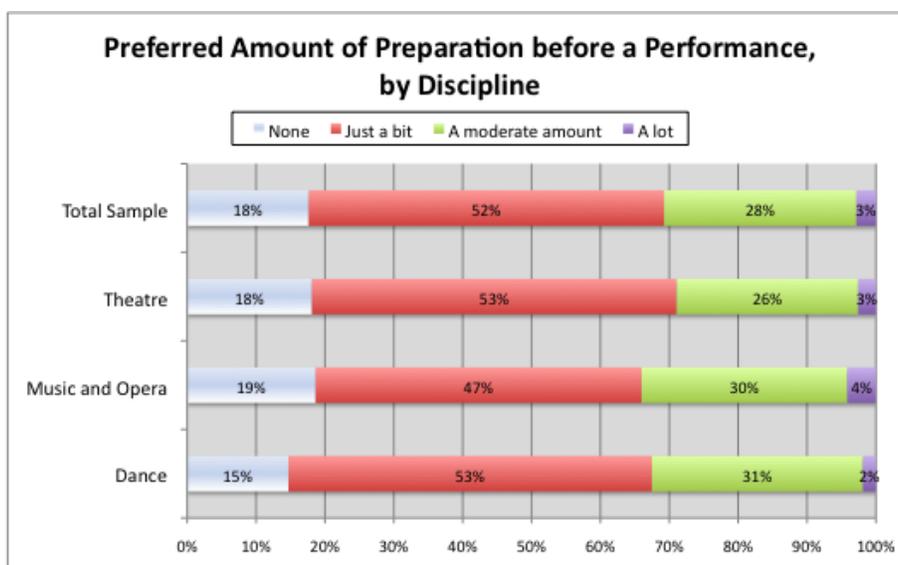
Social context is relatively consistent across disciplines



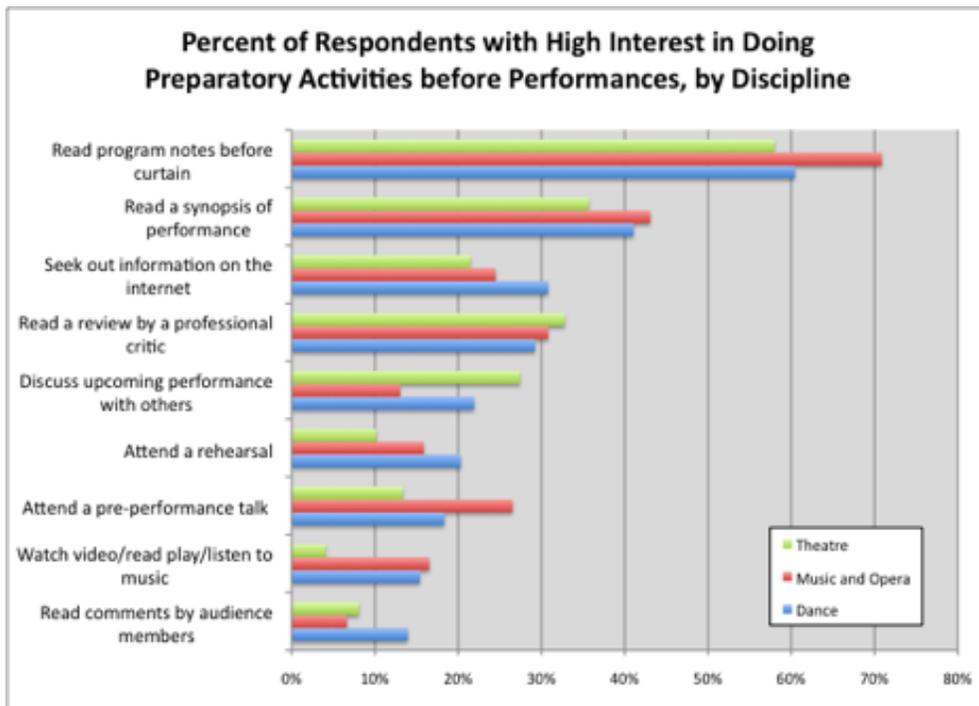
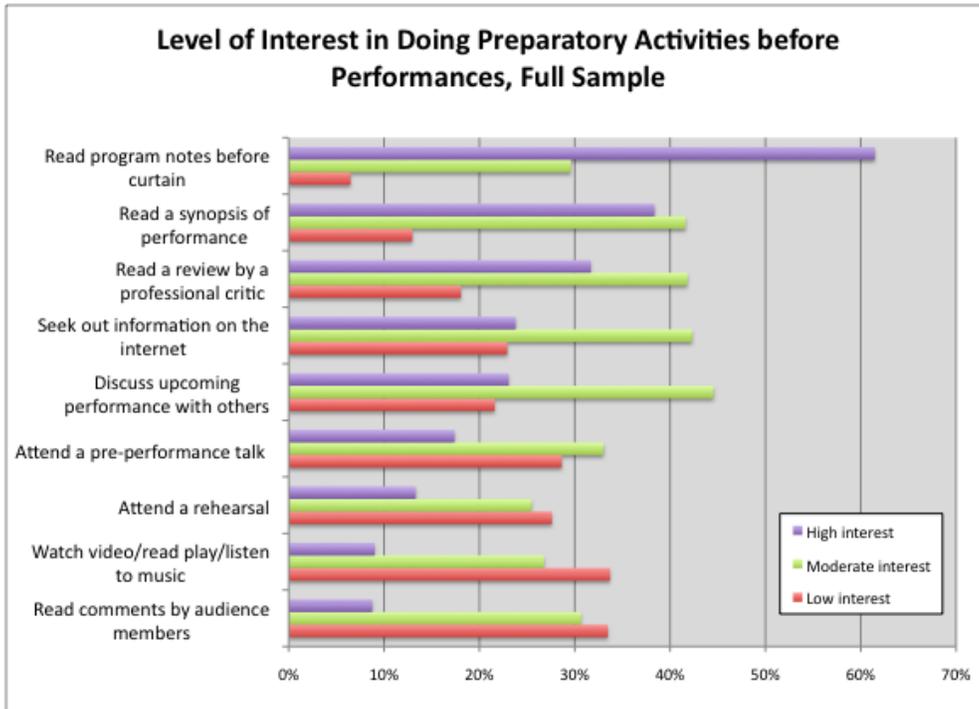


Engagement: Before

Very few people want to do “a lot” of preparation

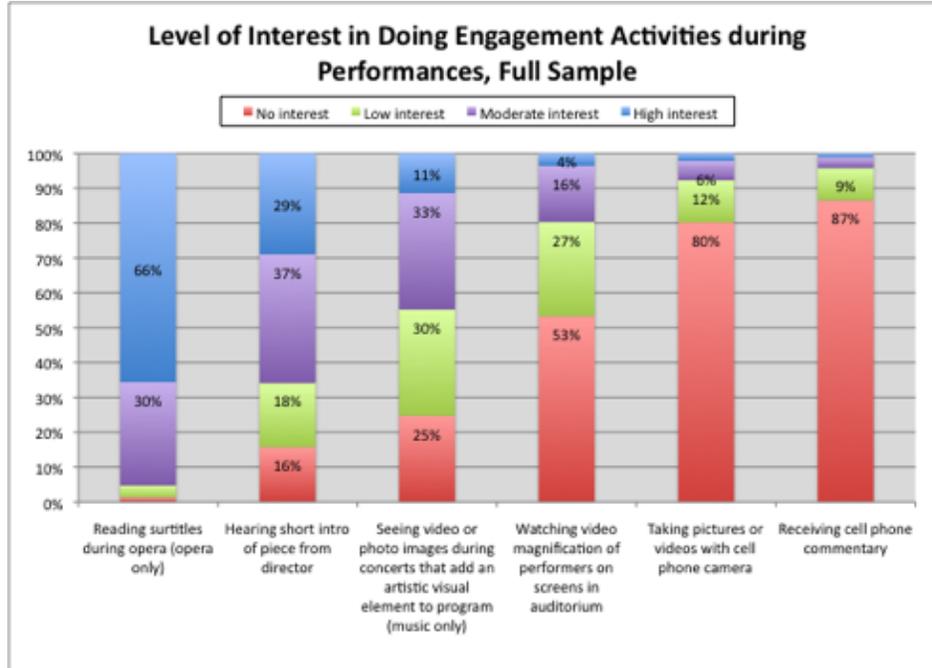


Most desire a modest amount of context

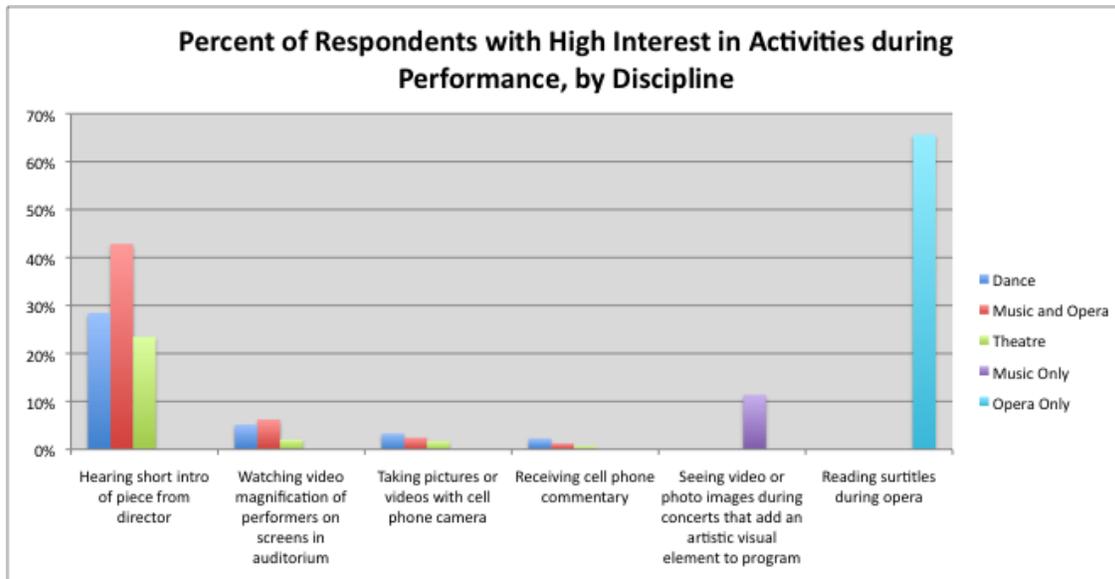


Engagement: During

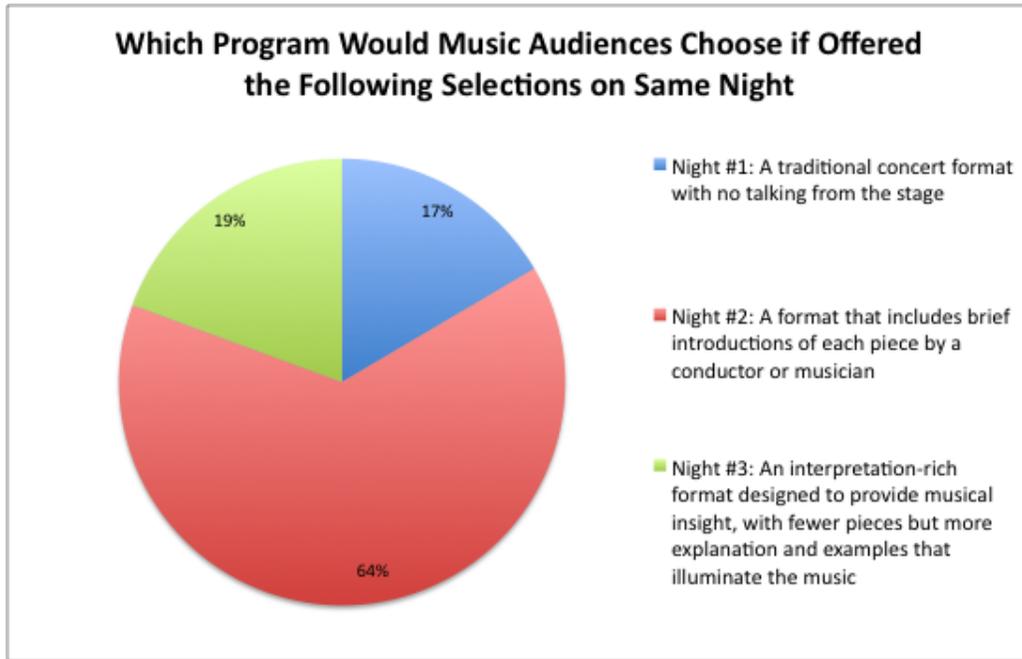
About a quarter of audiences are interested in trying out video/visual enhancements



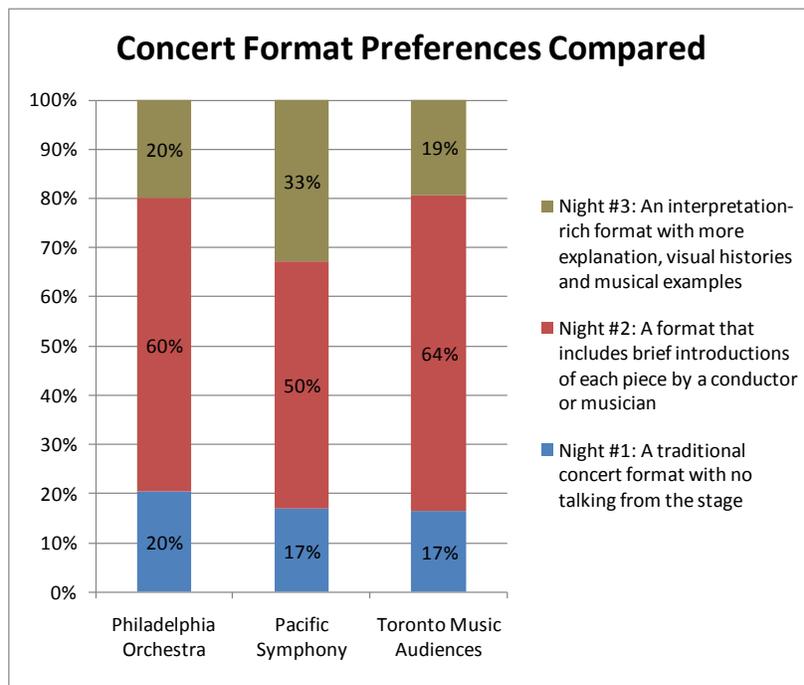
Few patrons report “high interest” in engagement activities during performances, except for watching surtitles and spoken introductions



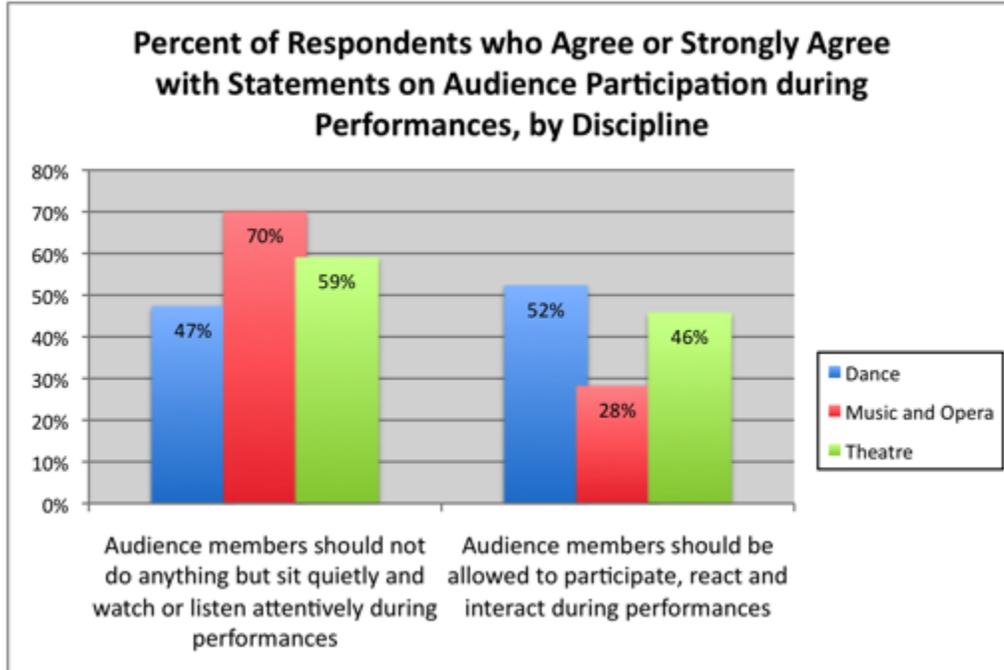
Four in five concert-goers desire at least some interpretive assistance



Toronto respondents are much like Philadelphia Orchestra patrons with respect to format preferences

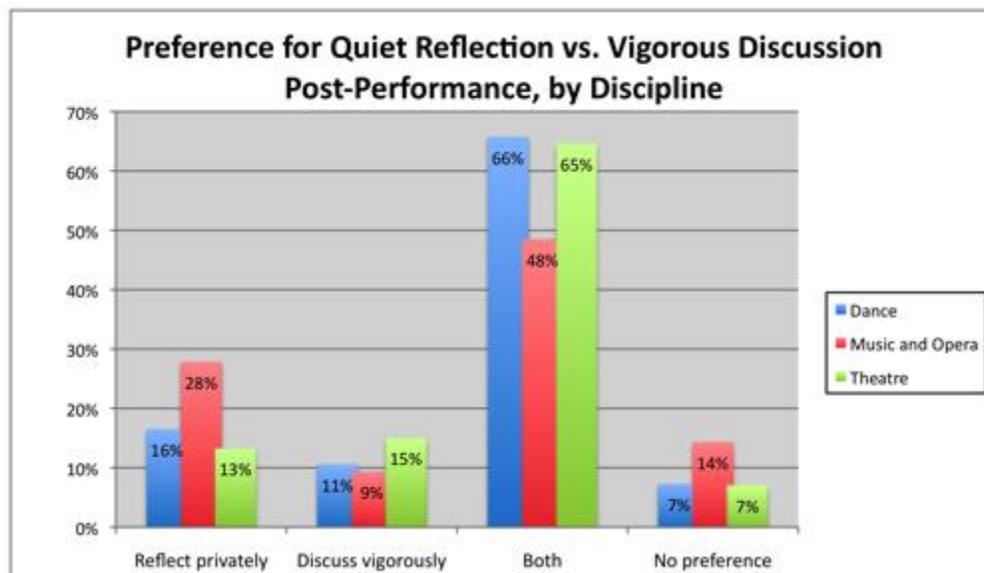


Dance audiences are most progressive in terms of desired level of interaction

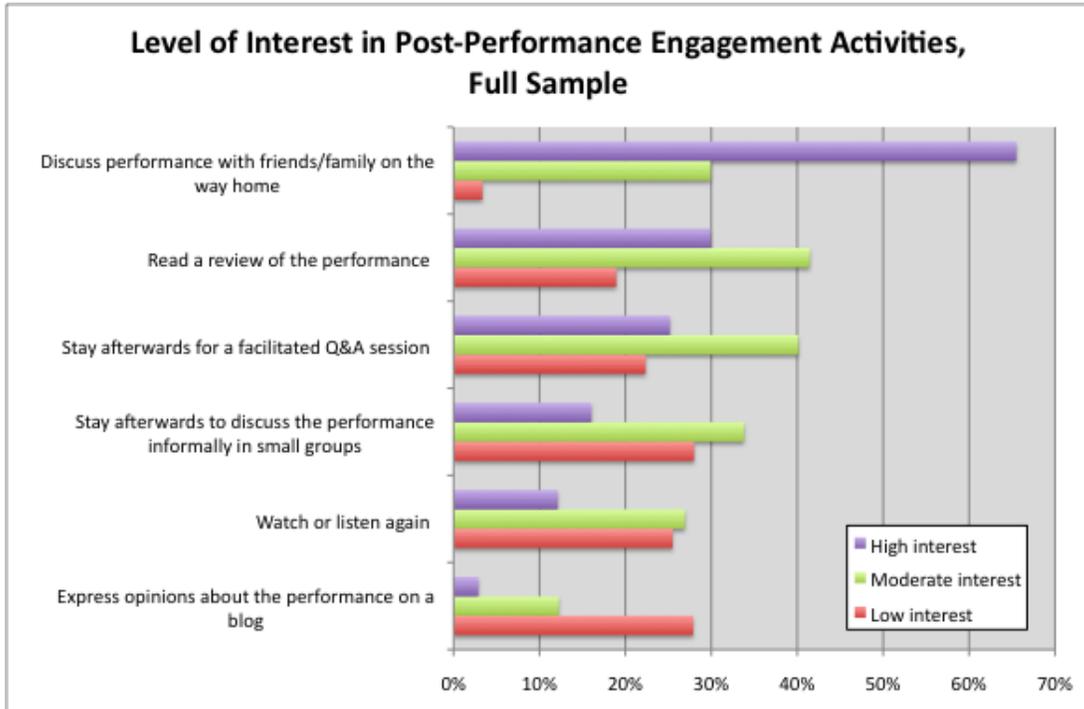


Engagement: After

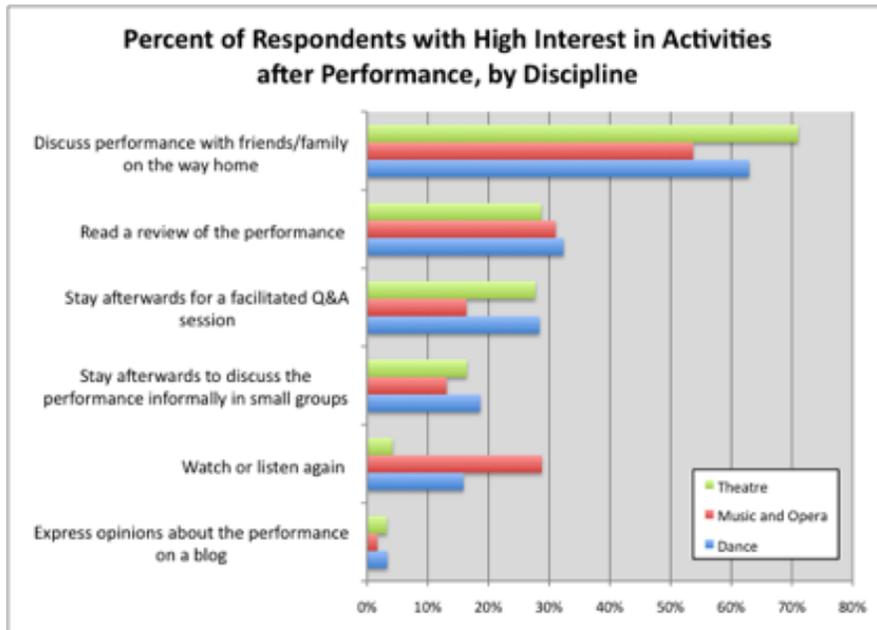
Music audiences tend to process the experience more privately



Informal discussion is the primary means of post-processing



About 30% of concert-goers enjoy “re-listening”



What underlying patterns can be discerned about engagement preferences?

Six Underlying Dimensions of Audience Engagement	Info. Seekers	Deep Insight	Critical Validation	Tech-Based Processor	Visual Interpretation	Talkers
	1	2	3	4	5	6
Watching/listening/reading piece before performance	0.59					
Reading program synopsis before performance	0.57					
Seeking out info about performance on internet beforehand	0.56			0.31		
Watching video/listening to recording after performance	0.39					
Reading program notes before curtain	0.36					
Attending a performance rehearsal		0.53				
Attending a performance pre-talk	0.30	0.59				
Staying after performance for facilitated Q&A		0.70				
Staying after performance for informal small group discussion with knowledgeable group member		0.64				0.40
Reading review by professional critic before performance			0.79			
Reading a review by professional critic after performance			0.78			
Expressing opinions about performance on blog or online forum				0.53		
Taking pictures with cell phone camera during performance				0.53		
Receiving real-time cell commentary during performance				0.35		
Seeing video/photo images that add artistic element during performance					0.60	
Watching video magnification during performance				0.39	0.52	
Hearing a short intro of performance					0.44	
Discussing an upcoming performance with others	0.36					0.38
Discussing performance with family/friends on way home						0.38
Reading comments by audience members before performance						
Extraction Method: Principal Axis Factoring.						
Rotation Method: Varimax with Kaiser Normalization.						
a. Rotation converged in 8 iterations.						

Summary Thoughts

- Audiences are diverse with respect to engagement preferences
- Think holistically about the art form, and all the ways that people engage with your art form
- How can you tap into the past experience that so many of your audience members have with the art form?
- Engagement activities that pay social dividends are likely to be popular
- Most people want to be engaged, but don't want to prepare a lot
- How can you engage "the big middle?"

Key Observations:

Take 2 or 3 minutes to share what you find most interesting or relevant to your work

Small Groups: You have 45 minutes to discuss the implications of the survey findings for your organizations, and work out what will be your “next steps.” (This is not a consensus exercise)

Report-Backs:

- What ideas are you leaving with?
- What issues and ideas will you discuss with your colleagues when you are back in the office?
- What further information do you need in order to refine your audience engagement activities and programs?

Phase 3: Interviewing Exercise

- An opportunity to gain in-depth feedback on your current or proposed audience engagement programs
- Tentative Dates (choose one of the following cycles):
 - Friday and Saturday, September 10-11, 2010
 - Friday and Saturday, September 24-25, 2010

Audience Engagement Individual Depth Interviewing Exercise Orientation Session

Presentation with Alan Brown December 3-4 and January 14-15

The Engaging Audiences component of the Audiences Project included two rounds of face to face interviews with companies' audience members, introduced by an "interviewing" workshop led by Alan Brown.

Day 1 Agenda

2:00 p.m.	Orientation
3:30 p.m.	Practice interview
4:30 p.m.	Break
5:00 p.m.	First interview (60 minutes)
6:00 p.m.	Quick debrief with your partner
6:15 p.m.	Break (dinner provided)
7:00 p.m.	Second interview (60 minutes)
8:00 p.m.	Quick debrief with your partner
8:15 p.m.	Break for the night

Day 2 Agenda

9:00 a.m.	Reconvene (light breakfast provided)
9:30 a.m.	Third interview (60 minutes)
10:30 a.m.	Quick debrief with your partner
11:00 a.m.	Fourth interview (60 minutes)
12:00 p.m.	Quick debrief with your partner
12:15 p.m.	Lunch provided
12:30 p.m.	Synthesis session
2:30 p.m.	Wrap-Up

Logistics

- Materials you will need for today:
 - Map of the facility, with room assignments
 - The names of your interviewees, so you may greet them by name
 - A blank copy of the interview protocol for each interviewee (for taking notes)
 - A copy of this orientation handout
- We will notify you when your interviewee is ready

- Greet your interviewees in the waiting area, and usher them to your interview room
- Afterwards, usher them back to the waiting area
- Make sure they get their incentive

Participatory Interviewing

- You are the researchers
 - Use your own experience and perspective to filter the data and figure out what's important
- Most of the data lives in your heads for a short while, then it will be gone
 - That's why we do a synthesis session immediately afterwards
- The sample is not representative of all audience members, but hopefully represents a cross-section
- What can you take away from four interviews?
 - Observations and “grounded theories” (i.e., informed assertions)

Interviewers

- Interviewers lead the conversation
 - Team members switch roles after each interview
- Decide how long to spend on each question
 - Probe, or move on?
- Help respondent out of tight spots
 - e.g., “here's how I would answer that”
- Always know what's your next question
 - Manage digressions tactfully

- Keep a sense of direction and flow

Recorders

- Recorders are “power listeners”
- Capture the important ideas that transpire during the interview
 - Use the lines underneath each question
 - Capture key verbatims if you can, using quotation marks
- Synthesize as you go
 - Inject your own observations in your notes
 - What is this person really saying?
- At the end of each interview, the Recorder has an option to ask a follow-up question
- Recorders lead the 10-minute debriefing after each interview

The Interview

- Make sure the respondent is comfortable
- Introduce yourselves (no need to give your job title)
- Respondent introduction
- Map out the conversation for the respondents
- Work through the discussion guide

The Interview Structure

- Respondent Introduction (10 minutes)
 - Family background
 - Work or professional/academic interests
 - Hobbies, person passions, etc.

- Creative outlets
- Art Form Focus: Meanings and Motivations (15 minutes)
 - Breadth of experience attending the art form
 - Tastes (aesthetic development)
 - Most valued attributes or elements of the performance experience
 - Definition of success
 - Positioning attributes of your company
- Exploring the Attendance Decision Process (15 minutes)
 - Decision-making process – roles
 - Factors affecting the decision (e.g., the program, price, venue, social context)
 - Negative decision – can you give an example?
- Attitudes About Engagement Activities (20 minutes)
- Three parallel modules of questions (before/during/after):
 - Overall preference for this type of activity
 - Familiarity with specific activities
 - Custom question: If [Your Org.] offered [a new or refined preparatory activity or information resource], how likely would you be to take advantage of such a [program/activity/resource]? What do you like or dislike about [this sort of program/activity/resource]?
- Concluding Question
 - What would make our programs more engaging to you?
- Wrap-up

Getting into the Discussion: Establishing Rapport

- The interview begins when you greet the respondent in the waiting room
 - Make a personal connection during the introductions
 - Look for something to build a conversation on, even if off topic
 - “How interesting, you moved to Toronto in 1965; it must’ve been so different then....”
 - Establish an environment of trust and mutual respect
 - Assure confidentiality
 - Provide encouragement throughout (e.g., “That’s a very thoughtful answer, thank you.” or “That’s an excellent point.”)
 - Show respect for your respondent by listening carefully, being patient, and providing opportunities to elaborate or clarify

Tips for Probing

- Listen for opportunities to probe
 - Follow up anything that piques your interest
 - Don’t let first answers be final answers – as if you are peeling back the layers of an onion to get to the core
 - “What do you mean when you say...”
 - “Why do you feel that way?”
 - This is not a linear process; refer back to earlier answers either to corroborate or challenge something
 - “Earlier you said this....is that the same as what you are talking about now?”

- Don't get caught up in the order of questions; tolerate digressions, if they are helpful; be careful about cutting off the respondent
- Some will have thought about the topic beforehand, while others are unprepared and might provide one word answers.
 - "Is there anything else you would like to add?"

Debriefing Afterwards

- Immediately after your interview is over, review the results of your interview
 - The Recorder should lead this discussion, drawing from his/her notes
 - What were the key points articulated by the respondent in each section?
 - Overall, how interested is the respondent in engagement activities? Which types?
 - Did you learn anything about how the respondent perceives your organization?
- Highlight or underline key ideas in your notes, so that you can access them easily tomorrow during the synthesis discussion

Questions?

Audience Engagement Individual Depth Interviewing Exercise

Prepared by Alan Brown, WolfBrown December 3-4, 2010

The interview protocol for Dance Companies and their audiences; different questions were prepared for Theatre, Music and Opera.

Interview Protocol –Dance

[Notes to the Interviewers are bracketed.] *Italicized text may be read verbatim or paraphrased by the interviewer.* Highlighted text requires customization by the interviewer. ***Bold** text is for emphasis.

We will review the interview protocol in detail at the orientation session.

Learning Objectives

The objectives of the interviewing exercise are: 1) to develop interviewing skills, 2) to illustrate how interviewing can be used as a means of institutional problem-solving, and 3) to build a shared understanding of audience members' values and motivations, and how they like to engage with the art form.

Before You Start

- Make sure your Respondent is comfortable, and has a beverage.
- Give introductions; there is no need to give specific titles – just say that you are “a representative of [organization name].”

Explain that the Recorder is here to capture the conversation, but won't participate in the discussion until the end.

Introduction by the Interviewer

Before we start, I'd like to give you just a little background on why we're here today.

Our conversation today is part of a study of performing arts audiences commissioned by the Creative Trust. Over 20 different Toronto-area arts groups are participating in the study.

The goal of the research is to gain a more nuanced understanding of what motivates individuals like you to attend live performances, and what types of educational or "enrichment" activities you enjoy.

*Specifically, our conversation today will focus on your attendance at **dance** performances.*

Your answers are confidential and will not be attributed to you. Therefore, please be as candid as possible with your responses. If I ever ask a question that you'd rather not answer for any reason, just tell me you'd prefer to skip that question, OK?

*I promise to let you go in 60 minutes. Afterwards, as a token of our appreciation for your time today, we have a small gift for you **[describe the gift you are giving the respondent]**.*

Do you have any questions before we begin?

Respondent Introduction (10 minutes)

1. *It would be helpful if you could start by giving me a little background on yourself. Tell me a little about your family and your work [or studies, for students]. How long have you lived in the Toronto area? Where else have you lived?*
2. *Outside of work, what activities, hobbies or interests are you passionate about? [Capture the first few answers] Anything else?*
3. [If not answered in the previous question] *How do you express yourself creatively? What are your avenues of creative expression? [If necessary prompt: dancing, acting, playing music, making art, photography, videos, writing, gardening, cooking, home decorating, etc.] Any others?*

Art Form Focus: Meaning and Motivations (15 minutes)

*Now I'd like to ask some questions about the totality of your experience attending **dance** performances.*

4. *First, can you give me an idea of the extent of your experience attending **dance** in the Toronto area? Which **dance** companies or presenters are you most familiar with?*
5. *How would you describe your taste in **dance**? What types or styles of **dance** do you most enjoy? Do you tend towards work that you know and love, or work that is new and challenging?*
6. *Generally speaking, what do you find most meaningful or important about attending live **dance** performances? Is there something specific that you look for?*

***Emphasis:** *When you go to a live **dance** performance, what do you hope to get out of the experience? What makes it worthwhile? [If necessary:] How do you know if you've had a successful evening?*

7. ***Emphasis:** *From an artistic standpoint, what distinguishes our work on stage from the work of other dance companies that you attend?* [Explore the extent and nature of differentiation.] [If necessary, mention one or two of the previously mentioned companies/presenters that the respondent attends.] [If necessary:] *For example, you might comment on how our work is stylistically different, or different in terms of quality, or different in terms of the audience experience.*

Exploring the Attendance Decision Process (15 minutes)

8. *How do you make decisions about which of our performances to attend? For example, who is typically involved in your decision process? Are you the sole decision maker, or do you make joint decisions?*
9. *What criteria weigh most heavily in your thought process? For example, do you assess the specific program being offered and the likelihood that you'll enjoy it, or do you decide on other factors, such as day of the week, ticket price, or the availability of someone to go with you?*
10. *Can you give an example of when you've chosen not to attend one of our programs? Why was that?*

Attitudes About Engagement Activities (20 minutes)

Next, I'd like to ask you about your preferences for different types of educational or "enrichment" programs and activities. Please take a look at this list of activities, which is organized in three sections. [Provide Respondent with "List of Enrichment Activities" handout] [Pause]

Engaging Audiences Before Performances

11. *Some people like to prepare in advance for live dance performances by reading about the company, or even attending a rehearsal or a pre-performance discussion. Are you someone who likes to prepare, or are you too busy, or just not interested in preparing?*
12. *Are there any specific preparatory activities that you've done in the past – either at home, or at a theatre, or somewhere else – that you really enjoyed?*
13. [Custom Question] *If Toronto Dance Theatre offered [a new or refined preparatory activity or information resource], how likely would you be to take advantage of such a [program/ activity/ resource]? What do you like or dislike about [this sort of program/ activity/ resource]?*

Engaging Audiences At/During Performances

14. *Next, consider the second section on the handout. Arts groups these days think a lot about how to deepen the audience experience during performances by offering context and interpretive assistance in various forms. Examples include supertitles at the opera, or spoken introductions from the stage. In general, how do you feel about these sorts of activities?*
15. *Are there any specific forms of interpretive assistance that you've enjoyed in the past?*

[Custom Question] *If Toronto Dance Theatre offered [a new or refined form of interpretive assistance] during our performances, would you see this as a favorable development, or an unfavorable one? What do you like or dislike about [this new or refined form of interpretive assistance]?*

Engaging Audiences After Performances

16. *Finally, please consider the third section on your handout. Some people like to vigorously discuss the program immediately afterward, while others prefer to reflect quietly. How do you like to digest or “process” live performances you’ve seen?*

17. *Are there any specific post-performance engagement activities that you’ve done in the past – either at home, or at a theatre, or somewhere else – that you really enjoyed?*

18. [Custom Question] *If Toronto Dance Theatre offered [a new or refined post-performance engagement activity], how likely would you be to take advantage of such a [program/ activity/ resource]? What do you like or dislike about [this sort of program/ activity/ resource]?*

Concluding Question

19. *Overall, what would make our programs more interesting or engaging to you?*

Wrap-Up

- As the Recorder if s/he has any questions or clarifications for the respondent
- Make sure Respondents receives his or her [gift or honorarium] on the way out.
- Thank You!

Waiting Room Warm-up Questions

Dear Friend,

Thanks so much for agreeing to participate in the study as an interviewee. Shortly, you'll be introduced to two people, an Interviewer, who will lead the conversation, and a Recorder, who will be listening and making notes.

While you're waiting, you might want to reflect a little on a couple of questions that you'll have a chance to discuss with your Interviewer. It is not necessary for you to formulate answers, although space is provided in case you'd like to make notes.

Questions for Reflection

1. Think about some of the recent dance performances you've attended. Which performances come to mind? What made them so special?
2. How would you describe your taste in dance?
3. What makes a live dance performance especially rewarding or meaningful to you?

Arts groups are thinking more and more these days about how to engage audiences more deeply.

What sorts of education or "enrichment" programs and activities have you enjoyed in the past?

How can arts groups make their programs more engaging?

List of Enrichment Activities – Dance

Before Performances

- Watch a video of the artists in advance of attending
- Read a short synopsis of the program in advance
- Read a preview or review by a professional critic
- Read comments about the artists or program by other audience members
- Seek out information on the web about the choreographer, company or pieces to be performed
- Discuss an upcoming dance performance with others who are going
- Attend a rehearsal
- Attend a pre-performance talk or briefing about the artists or program
- Read program notes before curtain

During or At Performances

- Hearing short introductions of each piece from the stage by the artistic director, choreographer or a company member
- Watching video magnification of the performers on screens hanging over the stage or in the auditorium
- Receiving real-time interpretive commentary on a cell phone or wireless device during the performance, either via Twitter or a Mobile App., with information about what you are watching
- Taking pictures or videos with your cell phone camera during performances (assuming permission)

After Performances

- Stay afterwards for a facilitated Q&A session with the artistic director or dancers

- Stay afterwards to discuss the performance informally in small groups, with a knowledgeable dancer in each group
- Discuss the performance with friends or family members on the way home
- Read a review of the performance by a professional critic
- Express your opinions about the performance in an online blog or forum
- Watch a video recording of the dancers or one of the pieces on the Internet

Performing Arts Education Overview (PAEO) Communications Plan

It was important to develop a plan of communications and engagement for the Arts Education component of the Audiences Project, and for the PAEO: we wanted the PAEO to be an action plan, rather than just a study.

Project & Communications Objectives:

- To devise and execute, in collaboration with PAONE and technical partners, a high-level survey of arts organizations with established education programs in the GTA
- To aggregate hard and anecdotal survey data and produce a report on the current state of arts education in Toronto
- To strengthen PAONE members' capacity to develop funding for their programming
- To share survey results – various approaches, best practices, funding and costs etc.
- To begin a public dialogue about arts education – attract media and public attention
- To communicate the benefits of arts education and advocate for increased access for all students

Target Audiences:

- Peers – heads of arts education programs in performing arts organizations
- Funders
- Government agencies and ministries
- Boards of education
- Academics
- Media – arts, education and lifestyle editors and journalists

Key Messages:

1. Toronto's performing arts community, educators and funders need a baseline study of current arts education programs (by professional arts organizations) in order to plan, model and execute education programs
2. Arts education can and should be an integral part of all arts organizations
3. Information about arts education will help schools and parents/guardians decide on the best arts activities for their children
4. Better-informed, PAONE members will raise the bar for arts education practice and peers will learn from each other

Strategies:

- Leverage existing data first – from CADAC, People for Education. OAC & TAC – to establish criteria, questions and project scope
- Prepare PAONE members for the survey/interviews by introducing them to Alan Brown (WolfBrown) and Kelly Hill (Hill Strategies)
- Communicate with and update stakeholders throughout the process

Tactics:

Meetings/discussions/events

- Contact potential supporters and consult with interested parties: Pat Bradley, OAC; Annie Kidder, People for Education; Christine Jackson, TDSB; Pat Tobin, DCH
- Announce project to PAONE members: June 3, 2010 in Stratford

- Write letter of introduction for PAONE
- Finalize report: November 2010
- Consider attending CODE conference in October 2010

Media Kit/Release

- Include: media release; project backgrounder with bios of principals; copy of the report; make images available on disc or on-line

Launch/Media Event

- Set date for an arts education conference – January or February 2011 – and launch the report
- Assign an “ambassador” for the project – this person can act as the media contact
- Find a compelling guest speaker to deliver the salient points of the report

Web pages/social media

- Set up a Facebook page for PAONE with reciprocal links to PAONE and CT websites
- Follow the process and key issues as they arise via CT blog and e-newsletters
- Recognize partners and financial support online and in print

Invitation to Participate in the Performing Arts Education Survey

An invitation to Creative Trust and PAONE members to participate in the **Performing Arts Education Overview**: the first comprehensive study of arts education activities by arts organizations in Toronto and the GTA. The PAEO study is attached as an addendum to this Tool Kit.

Please take part!

Creative Trust and the Professional Arts Organizations Network for Education (PAONE), in collaboration with Hill Strategies Research, invite you to participate in the first major study of the arts education programs of performing arts organizations in the Toronto area.

The *Performing Arts Education Overview* will collect and analyze information on the range, reach, and impact of your education programs in order to understand and communicate the contributions of performing arts companies to arts education; identify and understand best practices; and help companies develop programs that are successful in engaging communities and building awareness and participation in the performing arts.

About the online survey

- The survey will take between 30 and 40 minutes to complete
- One survey to be completed per company
- A copy of the survey in PDF format is attached; you may review the PDF in advance, think about your answers, and discuss them with your team before moving to the online survey
- The answers you provide will remain confidential and will not be used for any other purpose
- If you encounter any technical difficulties, please contact kelly@hillstrategies.com

You have until November 30, 2010 to fill out the survey

[Please click here to complete the survey.](#)

Thank you for helping us make this groundbreaking study the starting point for new awareness, appreciation and understanding of our community's impact and contributions to this increasingly important area.

We are grateful for the interest and support of the Ontario Ministry of Tourism and Culture, and Minister Michael Chan, in making this project possible.

Jini Stolk
Executive Director
Creative Trust

and

Patty Jarvis
President
PAONE

Performing Arts Education Overview Interview Questions

Interviews with selected participating companies, key funders, and other stakeholders were held as part of the PAEO. This is the interview protocol for arts organizations.

Interview Date: _____

Organization: _____

Position, Name, Contact

Artistic Director: _____

General Manager: _____

Arts Education Staff: _____

Major Current Education programs (from website):

Introduction

- Intent of the PAEO study
- Gather current and accurate statistics on the range reach and impact of the arts education programs of dance, theatre and music organizations in the Toronto area.
- Understand the contributions of performing arts companies to arts education,
- Identify and understand best practices in this important area.
- Be able to better support companies in their continued development of successful and excellent arts education programs and activities

- Process and timing of study
- Describe
- Timing of this interview
- Approx. 45 minutes - 1 hour

Purpose

1. What are the overall goals and intended impacts of your arts education programming?
2. What are the challenges in achieving these impacts? (i.e. What gets in the way?)

Organizational Structure

3. How are programs conceived and positioned within the organization?
4. Can you estimate the percentage of your organization's overall budget / resources that is spent on arts education programs?
5. Do you partner with any other arts organizations to provide arts education programs? With any community, social service or other organizations?

Do these collaborations assist in achieving your intended impacts?

Participation

6. Have the participants, audiences, etc. for your arts education activities changed in the past few years? What did your organization do to adapt?

Achievement

7. In your own estimation, what is your organization's most important achievement in arts education?
8. Have your education initiatives been successful in attracting or developing new audiences in the last few years?
9. Have they had important community impact?
10. Have they had an impact on your artistic programming or vision?

Future

11. Where would you like to see your arts education programming in 5 years?
12. What do you see as the priorities for moving the sector forward in the future?

Performing Arts Education Overview Launch Event: Agenda

Friday, December 16th, 2011

12:45 – 2:00 pm

Theatre Direct at Artscape Wychwood Barns

12:45 Guests arrive, sign-in: light refreshments available

12:55 Minister Chan arrives, is greeted at the Barns' Christie Street entrance by Anahita Azrahimi and escorted to the small theatre

1:10 Theatre Direct Artistic Director Lynda Hill briefly welcomes guests to the space

1:12 Patty Jarvis, Chair PAONE says a few words about PAONE, the people working in the arts education field, and the work they're doing

1:16 Jini Stolk, Executive Director Creative Trust says a few words about the connection between developing arts audiences and experiencing the arts at a young age; introduces the purpose and process of the Performing Arts Education Overview

1:21 Jini thanks Minister Chan for generously funding the Study and introduces the Minister

1:22 Minister Chan speaks about the importance of arts organizations' educational activities to the Province of Ontario

1:28 Jini thanks the Minister and introduces Kelly Hill, President Hill Strategies Research, who presents the Study's major findings

1:43 Questions from the floor

1:50 Jini Stolk and Patty Jarvis thank everyone for coming, and announce a series of community Roundtables to follow up on the Study' recommendations

PAEO 2012 Roundtables and Workshops: Announcement

Performing Arts Education Overview

A series of three community gatherings will be held following the release of the PAEO, the first comprehensive study of arts education activities by professional arts organizations in Toronto and the GTA

January 31, 2012: Roundtable

PAEO Conclusions and Recommendations: Creating an Action Plan

A discussion of how to organize to strengthen our arts education networks, improve collaboration and sharing, learn together, and communicate more effectively. Can we come together as a community with the goal of making Toronto a recognized international leader in arts education?

March 27, 2012: Workshop

Learning from Each Other: Sharing our Own Best Practices

Featuring programs and practices most frequently identified as the most successful, exciting, and with the greatest impact.

May 29, 2012: Workshop

Building Partnerships: A Discussion with our Most Valued Arts Education Collaborators

Featuring school board representatives, arts education specialists, and funders discussing the future of arts education in the GTA - evaluating, communicating and strengthening our impact on youth and the cultural future of our community.

Diversifying Audiences: Donna Walker's Workshop Proposal

Initial proposal, August 25, 2009, for the Diversifying Audiences component of the Audiences Project.

Donna Walker-Kuhne, Walker International Communications Group, Inc. is pleased to submit this outline with the goal of returning to Toronto to support the audience development initiatives of Creative Trust.

Scope of Work:

- Support the goal to create a template and strategy to diversify audiences
- Timeline; One year
- 2-3 Visits to provide consulting in the area of audience development through workshops and meetings
- Beginning spring 2010

First visit: Facilitate a roundtable session with both large and small multicultural organizations in break out sessions to discuss,

- Measurements of evaluation
- Creating synergy with large and small organizations
- Discuss the issue of cultural appropriation
- Balancing limited budgets and sustainable programs
- How to institutionalize the process of community engagement

- Integrate reading into the dialogue of suggested material that highlights case studies on effective efforts
- Inviting leading thinkers to comment on this topic
- In depth update on current trends and case studies on successful audience development programs
- Be pro active in exploring questions of sustainability and internal capacity of each organization
- Conclude these sessions with a template for implementation on sustainable audience development initiatives.

Second visit:

To work with organizations in focused workshops, analyzing specific challenges and providing strategies and measurements of evaluations. Incorporating discussion topics from roundtable discussion on a practical level based on the capacity of the organization.

Third visit:

Primarily to monitor efforts and evaluate progress with stated audience development goals. Implementation and assessment of efforts.

Fee structure:

- Plus travel and hotel expenses

Invitation to Diversifying Audiences Workshop

May 2012

Hi everyone.

Donna Walker-Kuhne will be in Toronto at the end of this month and has agreed to provide a special workshop around diversifying audiences for companies in the rapidly changing Regent Park area.

Some of you will soon be moving into this new diverse neighbourhood. For those of you who have been in the area for some time, the rapid transition taking place offers opportunities and challenges. We think you will all benefit from Donna's wonderful insights in to building new community relationships and audiences.

As you may know, Donna has been working with our members and others around developing/diversifying audiences - she's truly one of the best in the field, coming originally from Dance Theatre Harlem but now working with a range of performing companies in the New York area. You can read the following blog posts, [Expanding Audiences](#) & [Getting Down to Work](#) , on Donna's previous workshops with Creative Trust.

The session will be held on May 30th, 1 – 4 : 0 0 pm at a location to be confirmed .

Please let us know at your earliest convenience and if possible by **tomorrow** if you and/or others from your company will be able to attend.

Looking forward to hearing back from you.

Thanks, Jini Stolk

The Sun Life Performing Arts Access Program and Picasso PRO Backgrounder

Increasing access for audiences with disabilities was an important component of the Audiences Project, delivered in partnership with Picasso PRO.

The Sun Life Performing Arts Access Program is a two-year program to help create ongoing communications access through Audio Description [AD] for Blind/Low-Vision Audiences and ASL Interpretation for Deaf/Hard of Hearing audiences. The process will help performing arts companies to launch and integrate services properly into their organizational cultures and programming.

Toronto's Deaf and disability communities are large, diverse, active and growing as our aging population grows. Access will enable these communities to participate more fully in Toronto's cultural life. Accessible programming in turn enables theatres to develop new audiences, along with their spouses, families and friends. Access will allow Toronto to rightfully retain its place on a world stage which increasingly reflects the values of diversity and inclusion.

Picasso PRO and Creative Trust: A coming together of leadership, value-based mandates and facilities-linked activities. Access is a key point of collaboration.

About Picasso PRO: Picasso PRO is a long-term project formed to facilitate genuine opportunity and inclusion for Deaf and disabled artists and audiences in the performing & media arts. It springs from the passionate conviction that artists and audiences with disabilities and Deaf artists and

audiences, belong on Ontario and Canada's stages and screens, among our patrons, professional staffs, teachers and cultural leaders.

Arts Access Program Press Release

April 27th, 2009

Announcing Creative Trust's partnership with Picasso Pro – an arts and disabilities organization – and introducing our collaborative focus on arts access for Deaf, hard of hearing and blind/ low vision audiences.

For immediate release

Media enquiries: Rose Jacobson

Picasso PRO Launches New Program in Collaboration with Creative Trust

Picasso PRO, a long-term project focused on bridging disability and the performing & media arts, is delighted to announce a new 30 month program cycle in collaboration with **Creative Trust** made possible through the **Ontario Trillium Foundation's Province-wide Program**.

Picasso PRO was formed to facilitate genuine opportunity for artists with disabilities and Deaf artists in the performing and media arts. It springs from the passionate conviction that Deaf and disabled artists belong on Canada's stages and screens and among our audiences, professional staffs, teachers and cultural leaders.

Since 1993, **Picasso PRO**, originally called *DIS THIS!*, has enjoyed five programming cycles under the management of **Rose Jacobson**. **Picasso PRO** remains highly responsive to the community's needs through an evolving program of skills development, artist support, networking, creation, collaboration and services for the up and coming professional. All activities are grounded in a strong commitment to the artists' creative, professional and human rights.

“Ryerson’s Disability Studies Program recognizes an urgent need for dedicated arts professionals to mentor and support the emergence of fresh new voices from the diverse and far-flung disability community. Picasso PRO serves a unique and critically important role in building artistic and cultural capacity and supporting distinct artistic practice in Toronto and Ontario.” - Catherine Frazee, co-director Ryerson RBC Institute for Disability Studies Research & Education

Creative Trust’s mandate aims to improve the financial health and sustainability of some of Toronto’s most innovative and accomplished performing arts companies. Together CT’s members represent a sizeable chunk of the professional producing, presenting and training performing arts companies in Toronto.

Access is a key point of entry for **Picasso PRO’s** collaboration with **Creative Trust**. Along with other artistic and peer-to-peer opportunities, we will research facilities and advocate for resources to improve barrier-free access to Toronto and Ontario’s arts venues.

“This collaboration is based on trust and an awareness of overall social goals which go beyond any one organization’s efforts. It is bound by personal connections; it is peer-based. It requires knowledge-sharing and mutual support in dealing with complex problems.” – Jini Stolk, Executive Director Creative Trust

Picasso PRO/CT’s upcoming workplan positions Ontario’s artists with disabilities firmly within the international Dis-Art movement and hopes to act as an agent of social change, documenting the sector while supporting professionalism and excellence in artistic practice by:

- Building new regional networks through outreach to targeted communities

- Consolidating best practices and sharing tools with communities outside Toronto
- Enhancing the careers of intermediate and senior Deaf artists and artists with disabilities
- Identifying younger artists (18-25) and introducing them to a variety of arts practice
- Challenging industry standards, non-inclusive practices, negative media depictions of disability and advocating for positive alternatives.

Over the past 15 years **Picasso PRO** has grown from a nucleus of eight core artists to a pool of over 70 active participants, 30 artists in teaching/mentoring roles, 18 ASL Interpreters, physical facilitators and tech specialists as well as more than 40 associate organizations, groups, community activists and advocates. Our specialists have included **Alex Bulmer, Fides Krucker, Caglar Kimyoncu, Michael Kennard, Kate Lynch, Viv Moore, David Skelton, Donna Michelle St-Bernard, Mark Christmann, Karin Randoja, Paula Wing and Josette Bushell-Mingo** to name only a few.

Aside from the obvious power which self-determination engenders, it is producing a vital canon of work: films, stories, performances, books, plays, installations and entirely new artforms created through the prism of disability. This is the work that **Picasso PRO/CT** intends to nurture and support.

“Someone once told me that you need to plant your own garden instead of waiting for someone to give you flowers...so... always remember to surround yourself with gardeners! We feel that Picasso PRO is building a greenhouse... so thank you Picasso PRO!” – Kat Germain and Allen Redford, founder and artistic

associate, the Mutt Theatre Company

Please join us in celebrating the official Launch of **Picasso PRO/CT** on Sunday May 31st, 2009 at Tallulah's Cabaret, Buddies in Bad Times Theatre, 4:00 - 6:00 p.m.

-30-