

Final Report on Phase 1

Creative Management in the Arts and Heritage:
Sustaining and Renewing Professional Management
For the 21st Century

A project of the Canadian Conference of the Arts
In collaboration with the Cultural Human Resources Council

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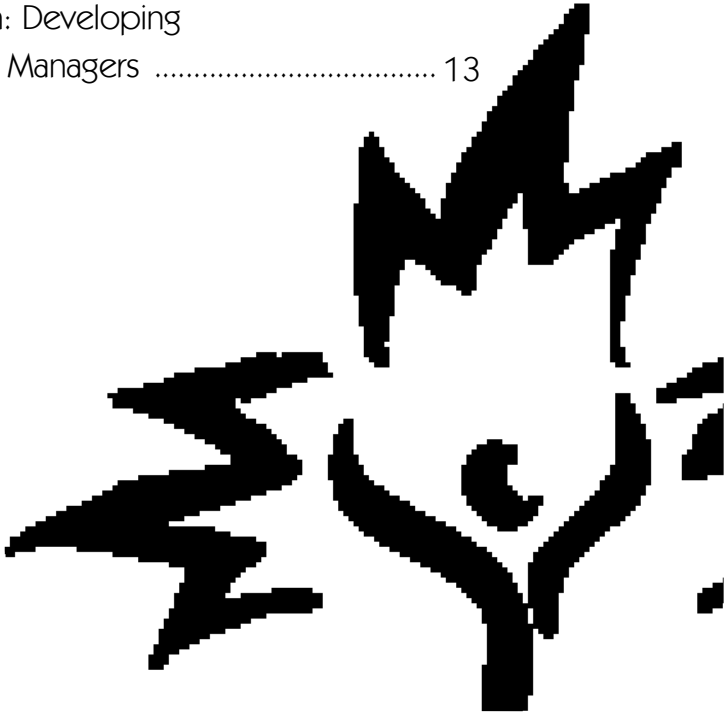


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INTRODUCTION

This paper is the final report of the first phase of the Creative Management project, which deals with one of the most challenging resource dilemmas facing Canada's not-for-profit arts and heritage sector - how we can keep our current experienced managers and administrators in the sector and provide for their professional renewal, and how we can attract, develop and retain a new generation of committed managers to continue the work of our present leaders.

Over the next five to ten years, the huge baby boom generation, whose members occupy many mid- to senior-level jobs in all sectors of the economy, will begin retiring, while the number of workers under age 30 starts to plummet. The next generations of professionals will be the best-educated cohorts in Canadian history, technologically savvy, culturally diverse, and highly marketable - but few in number and burdened by record-high student debt loads.

With their pick of jobs, will they choose to work in Canada's not-for-profit arts and heritage organizations?

Throughout Canada, in governments, corporations and the not-for-profit sector, there is a growing sense of urgency about the chronic shortage of workers in the decades ahead. Employers are well-aware that the market for tomorrow's professionals will be highly competitive, and organizations from the Conference Board of Canada, the Public Service Commission of Canada, the Canadian Federation of Independent Business, the Canadian Policy Research Networks, and the Voluntary Sector Initiative to a host of Canadian corporations have initiated major studies on human resource development, leadership succession, and attracting and retaining young workers.

Within the arts and heritage sector, serious systemic problems are already apparent. A recent edition of *Muse*, the news magazine of the Canadian Museums Association, reflected that "the first generation of Canadian museums is coming to a close, and with it the generation of people that have been running them for the past 25 or 30 years. In its wake is, in many cases, a noticeable dearth of leadership or support."¹

A report on performing arts managers undertaken for the Professional Opera Companies of Canada, the Professional Association of Canadian Theatres, and Orchestras Canada found that:

"There is a crisis of people leaving the field and the next generation of leaders not being there to replace them. . . . The funding cuts of the mid 1990s decimated the ranks of upcoming young managers and now there is a squeeze: the current generation of managers is quitting or retiring and the succeeding generation is insufficient to provide replacements."²

Throughout the arts and heritage sector, the current leaders of our organizations (artistic and administrative) are among the pioneers who built the extensive infrastructure of cultural organizations in this country - an extraordinarily large number of organizations of all sizes, in all disciplines, with highly diverse mandates, which bring the work of Canadian artists and Canadian cultural experiences to audiences in all parts of the country and abroad. The current leaders are acutely aware of the need to find, develop and retain their successors -

men and women willing and equipped to take on the responsibility of leading our organizations in the future.

This concern is widely shared within the arts and heritage sector and among many stakeholders. Arts and museum service organizations, cultural human resource councils and networks, and government departments and funding agencies have identified the next generation of management personnel and issues of leadership and succession planning as critical priorities.

The reason is not hard to find. In order to sustain the organizations we have created to connect Canadian art and culture with the public, we need a second generation of leaders as committed and effective as the pioneers. Finding means to keep experienced people in the work force and to attract and develop subsequent generations is therefore crucial. A sector which cannot recruit and retain competent, well-trained and dedicated management personnel will not be capable of sustaining itself now or in the future.

The partners in the Creative Management project recognize the importance of succession planning and the development of new generations in **all** the professions in the sector - artists, production personnel, technical staff, conservators, and many others. Our focus on management is not intended to overlook other needs but to acknowledge the particular group of workers which has the chief custodial responsibility for their organizations' development, stability and survival.

As an experienced manager recently noted, "A sustainable organization is one in which all essential aspects of the infrastructure are healthy, developed and resilient - and that includes its human capital."

In light of the importance of this subject, the Samuel and Saidye Bronfman Family Foundation (SSBFF), the Canadian Conference of the Arts (CCA), and the Cultural Human Resources Council (CHRC) agreed that it was timely to launch the Creative Management project.

The Creative Management Project

The Creative Management project (Sustaining and Renewing Professional Management for the 21st Century) was initiated by the SSBFF, which is providing major financial support for the project. It is being carried out by the CCA in collaboration with CHRC and with additional financial assistance from the Department of Canadian Heritage (DCH). A Steering Committee made up of John Hobday, Executive Director of the SSBFF, Susan Annis, Interim Executive Director of CHRC, Megan Williams, National Director of the CCA, and the project coordinator, Jocelyn Harvey, oversees the work.

The project is concerned with all levels of administrative/management personnel in not-for-profit performing, visual and media arts organizations, and museums and galleries - senior, mid-career, and new entrants currently in the not-for-profit work force and those preparing for and interested in such careers. Its goal is the development and implementation of a comprehensive human resources strategy for professional management based on practical, actionable recommendations to improve conditions for the retention and renewal of the management labour force and the recruitment and retention of qualified young and new workers.

Creative Management is divided into three phases.

- ♦ Phase 1 (March-mid July 2002) has been devoted to identifying the major current challenges and needs and initiating discussion of practical, workable solutions. It culminated in a national meeting on the project at the June 2002 Chalmers conference. This report presents the findings and recommendations which emerged at that conference, especially about the best solutions to pursue.
- ♦ In phase 2 (mid July through November 2002), necessary research will be completed and the recommended solutions will be developed in detail in a comprehensive action plan with specific goals and timeframes for implementation. It is anticipated that the solutions will be multi-faceted and addressed to a diverse group of organizations, potential funders, and other stakeholders.
- ♦ Phase 3 (December 2002-February 2003) will be devoted to advocacy for the implementation of the action plan and negotiations with the organizations, funders and other stakeholders to whom the recommended solutions are addressed.

The work of phase 1 has involved a research and literature review on issues of leadership development and succession (in culture and other sectors) and group and individual consultations. Consultations included an initial roundtable meeting which brought together 25 Canadians with extensive knowledge and experience in professional management to advise on the substance and process of the project, presentations to the Canadian Arts Summit, organized by the Council for Business and the Arts in Canada at the Banff Centre, and to the annual meeting of the Canadian Association of Arts Administration Educators, and a substantial number of one-on-one focused interviews with individuals in the arts and museum community and other stakeholders.³

The findings from the research review and consultations were presented in a national forum at the June 2002 Chalmers conference, an annual meeting of arts service organizations convened by the CCA and this year co-hosted by the CCA and the CHRC with financial support from SSBFF.

Entitled *Creative Management, Creative Solutions*, the Chalmers conference was attended by about 80 representatives of service organizations, government agencies and departments, the Board and staff of the CHRC, the Board and staff of the CCA, cultural management educators, directors of human resources, and provincial cultural HR councils and networks. The CCA and CHRC encouraged participation by younger cultural managers by offering a reduced registration fee, and a number of young managers took an active part in the discussions. Government departments and agencies participating included the Department of Canadian Heritage, the Canada Council for the Arts, Human Resources Development Canada, the Ministry of Culture of Ontario, the Ontario Arts Council, the Manitoba Arts Council and the Toronto Arts Council.

Participants at the conference were invited to comment on the findings of a discussion paper prepared for the event, which included an analysis of the major challenges (see Annex A of this report) and an initial list of suggested solutions, to "test" the validity of the findings, introduce important additional perspectives, and help develop the most desirable and workable solutions.

The conference strongly endorsed the timeliness and relevance of the project. Participants stressed the importance of improving conditions for cultural management personnel in not-

for-profit cultural organizations and identified a comprehensive action plan for management development and retention as key to the sustainability of Canada's arts and heritage institutions.

A young manager commented in evaluating the conference, "It is reassuring that our cultural leaders are taking these issues seriously. If the solutions brought up today are not put into practice, younger managers will not stay in their organizations."

Participants proposed a variety of practical solutions, suggested the organizations and groups to which the solutions should be addressed, and committed to working together toward a comprehensive plan.

There was widespread agreement that a coordinated, integrated approach drawing on all key resources and stakeholders is essential.

Related Initiatives

During the course of phase 1, members of the Steering Committee have worked closely with two initiatives related to the goals of the Creative Management project.

The first is the Cultural Human Resources Sector Study Update, a study of the characteristics of work and key issues affecting human resource development in the cultural sector, which is being undertaken through the CHRC with the support of Human Resources Development Canada (HRDC) and Canadian Heritage.

This study deals with the entire Canadian cultural sector, both commercial and not-for-profit, focusing on modes of employment, access to learning, recruitment/retention, and new competency demands. Though its universe is much broader than that of Creative Management, the study recognizes, as its terms of reference state, that "of all the major factors influencing the culture sector, the development and retention of effective culture managers seems a key building block."⁴

The second initiative is the work of the Portfolio Arts Policy committee, a group of senior federal officials from the Department of Canadian Heritage, the Canada Council for the Arts, the National Arts Centre, the National Film Board, the National Gallery, the Canadian Museum of Civilization, the National Library, and the National Archives. The leaders of these organizations have identified the development of the next generation of management/administrative personnel in Canadian cultural organizations as a priority concern of the portfolio. The CCA is working with the committee on this subject, keeping members informed as the Creative Management project develops, and reporting to them at intervals.

As part of the major new investment of federal resources under the Tomorrow Starts Today umbrella, announced in May 2001, the Government of Canada has committed significant funds to improve conditions for organizational development and stability in the arts and heritage sector, through programs for stabilization, capacity-building, and endowments. The interest of the portfolio agencies suggests an awareness that the sustainability of Canada's arts organizations and museums will depend on our success in developing and retaining qualified, committed leaders for tomorrow.

These two initiatives may herald powerful positive synergies at the national level that will be helpful in producing real and lasting solutions to the challenges identified in the Creative Management project.

How This Report is Organized

The chapter that follows (Creating Winning Conditions: Calls to Action) reports on the solutions recommended by those consulted for the project, with special emphasis on solutions endorsed by the Chalmers participants. The guidelines for solutions, immediate research needs, and core priority solutions are presented, the latter first by subject matter and second by the organizations and groups to whom they are directed.

Annex A (The Challenges) is a revised version of the discussion paper provided for the Chalmers conference. It presents the consensus which emerged in the course of the consultations and additional points raised at the Chalmers meeting about the systemic issues and barriers to keeping current management personnel in the workforce, providing opportunities for their professional renewal, and attracting and retaining the next generation. Annex B (Key Informants in Phase 1) provides the list of those consulted for the project to-date.

This chapter presents the practical solutions identified by respondents to the Creative

CREATING WINNING CONDITIONS: CALLS TO ACTION

Management project, with particular emphasis on the solutions endorsed by a consensus of opinion at the Chalmers conference.

Guidelines for Solutions

The Chalmers participants proposed a number of guidelines for solutions:

- ♦ Develop a coordinated, integrated approach which makes use of all key resources and calls for action from all key stakeholders in a comprehensive action plan. Responsibility to take action belongs to all the stakeholders, including managers, artists and boards of cultural organizations, arts service organizations, government departments and funding agencies, cultural human resource councils, Human Resource Development Canada, etc.
- ♦ Ensure that the solutions are practical and actionable. Achieving attitudinal change (such as learning to value management as a profession and to recognize that the quality of management is essential to putting the art on stage and bringing it successfully to the public) takes time and is more likely to be the consequence of concrete changes in policies and practices than of moral suasion.
- ♦ Assign responsibility to specific organizations and groups and set specific goals and deadlines, including a means for follow-up so that organizations responsible for specific actions can report on their progress.
- ♦ Ensure that solutions are sufficiently flexible to respond to the diverse needs of the sector (including the large percentage of organizations which are small one-to-three person shops) and the different ways in which people learn (some learn best by doing, others by observing, others by formal study, others by e-learning, and yet others by a combination of these means).
- ♦ Maintain pressure on governments and funding agencies to increase core (operating) funding. While some of the solutions proposed in this report can be implemented with current levels of public funding or modest additions, the fact that many governments have reduced core funding has contributed to the instability of cultural organizations, made working conditions more difficult, led to heavier workloads, and increased pressures to reduce expenditures on the human infrastructure, including the number of staff, their compensation and their professional development.
- ♦ Adopt a consistent and persistent advocacy approach for the implementation of the solutions proposed in this report.

Immediate Research Needs

The Chalmers conference confirmed that research and data are needed in the following areas:

- ♦ A comprehensive national compensation study of management and administrative personnel in not-for-profit arts organizations which includes pay, benefits, turnover, and spending on staff training and professional development

As is discussed more fully in the presentation on The Challenges in Annex A, we have a great deal of anecdotal information about compensation in the arts in Canada which indicates that, with some exceptions (usually in the largest institutions), salaries are generally poor and benefits, beyond the statutory, are weak or non-existent. But, while there is an excellent recent compensation survey of Canadian museums and galleries by the Canadian Museums Association, no comparable and current national compensation data exists for not-for-profit arts organizations. This is a major lack.

The Chalmers participants strongly endorsed the need for a national compensation survey on the salaries and benefits of management and administrative personnel in not-for-profit performing, visual and media arts organizations. They also suggested that the survey include turnover rates of administrative personnel and the organizations' expenditures on staff training and professional development.

Accurate and up-to-date data about compensation will allow us to analyze compensation issues with precision and certainty. The information can help establish minimum/optimum salary ranges for given jobs, and in organizations where pay and benefits lag behind the "norm" it can provide evidence for boards of directors about the need for improvement.

Turnover information linked to the reasons people give for leaving an organization will help us pinpoint jobs, disciplines and/or regions where turnover is undesirably high and thus help boards, managers and funding agencies identify the causes and potential solutions.

The accepted benchmark for expenditures on staff training and professional development in Canada is 1.5% of total payroll. It would be very informative to have data on expenditures on this item by Canada's not-for-profit arts organizations, so that we can compare our sector's performance against the benchmark and provide useful material for decision-making by boards of arts organizations and funding agencies.

Given the importance young managers place on ongoing professional development, as Annex A shows, boards will want to assess their organization's performance on this measure as an indicator of potential success in attracting and retaining the best new workers.

To maximize the effectiveness and comparability of the compensation survey, it should be carried out in collaboration with the relevant national arts service organizations, and a basic survey template should be prepared for use in all the disciplines with additional survey questions specific to one particular discipline inserted as appropriate.

At a minimum, the survey should examine compensation and turnover by job type (occupation), discipline, type of organization, size of the organizations' budget, region of Canada, and gender.

- ◊ An inventory of available internship/mentorship programs for new and emerging administrators/managers
- ◊ An inventory of available professional development and professional renewal programs for current managers in the work force

Inventories of available internship/mentorship and professional development programs, collected nationally with basic information on the programs and where to get details, would be very useful.

Such information could be provided to students in arts and museum administration programs, students taking fine arts training, and those preparing for professional careers as artists, to inform them about available opportunities.

The inventories could be circulated by arts and museum service organizations to their members and would be useful to cultural human resources organizations, management educators, and service organizations looking for opportunities, models and shared interests. They may also help us determine where or in what discipline or province there are gaps in the provision of these opportunities.

The two inventories on internships and professional renewal will be developed during the next phase of the Creative Management project. The national compensation survey, however, is beyond the means of the project and is the subject of a specific recommendation addressed to federal officials and national arts service organizations later in this report.

Core Priority Solutions by Subject

The Chalmers participants raised many suggestions for solutions to the current problems and challenges, but there was a clear sense of priority about a set of core solutions. These are outlined and described below.

1. Recognition, Validation and Advocacy: Increasing Knowledge of and Respect for the Profession of Cultural Manager

Chalmers participants, like those consulted earlier in the Creative Management project, agreed that arts and heritage management is not yet well-understood or well-valued as a profession. Four of the core solutions addressed the need to recognize, validate and advocate for the profession.

- ♦ Investigate means of validating the profession such as certification, accreditation, competency development, and benchmarks/best practices.

While there are a variety of viewpoints in the sector about processes for validating the profession and opinion has not settled on any given mechanism, the Chalmers participants, like those in the earlier roundtable, expressed interest in examining various options, specifically certification, accreditation, competency development, and management benchmarks or best practices.

A number of professions (among them, management consultants, human resource professionals, fundraisers, and accountants, to cite a few examples) have developed a formal means for validating the field, a set of common skill and competency requirements (a common base of knowledge), and a code of ethics and professional standards. Options range from formal (and sometimes mandatory) certification or accreditation to the less restrictive route of competency skills development and benchmarking.

Professions with a formal means of validation find that it increases public awareness of the value of the profession, improves the overall level of practitioner skills, and ultimately leads to higher pay and better working conditions. The Chalmers participants called for an exploration of the options available and an analysis of which option would be most appropriate for not-for-profit arts and museum managers.

- ♦ Inform students in university fine arts programs and artists' training institutions about management as a career option, possibly in the context of a course on careers in the sector.

People typically come into cultural management from a variety of backgrounds and studies, and the Chalmers participants felt that multiple points of entry should always be available. People who begin with an artistic practice often turn to arts management, sometimes after having experience in managing their own artistic career. With a natural interest in the arts and a base of cultural knowledge, they are desirable future administrators.

Chalmers participants would like to see students in fine arts programs and those training for professional careers as artists informed about management as a career possibility.

- ♦ Create and promote national awards for distinguished service as arts and museum managers.

Canada is blessed with many excellent high-profile awards for artists in all disciplines, but it has no prestigious national honours for distinguished service in arts and museum management.⁵ This lack was lamented by many of those consulted in this project.

The Governor General's Performing Arts Awards, in addition to honouring great artists, provide a major award each year to an outstanding volunteer leader in the arts. This award has raised public and media consciousness of the importance of volunteer activity in the sector. Instituting national awards for management would give the field a prominent public profile and reward outstanding service.

To promote cultural management as a career choice, celebrate the transfer of knowledge between generations, and provide attractive public and media awareness opportunities, the awards would ideally honour both distinguished managers and emerging managers of their choice.

- ♦ Promote cultural management as a career choice for secondary and post-secondary students.

CHRC and the provincial sectoral council networks and councils provide information about and promote employment in the various disciplines and specializations in the cultural sector. Chalmers participants recommended that they ensure that careers in cultural management are included in the material they provide to students, parents, guidance counsellors and other educators.

2. Human Resource Policies and Practices: Integrating Human Resource Policies and Practices in the Sector, Sharing HR Information, Expertise and Resources

As the description of The Challenges in Annex A illustrates, there is an emerging consciousness about the importance of human resource issues in Canada's not-for-profit cultural organizations. While "an HR culture" is far from being firmly established and the Chalmers participants cautioned that there is still a great deal of work to do to integrate HR concerns in the sector, there was wide agreement that the increasing attention being paid to HR questions is healthy and should be positively encouraged.

The younger managers taking part in the conference reinforced the findings of the discussion paper about their strong desire for a progressive HR regime, particularly for formal HR policies and practices, ongoing professional development opportunities, an environment which provides a sense of accomplishment and teamwork, and a healthy work-life balance.

The participants suggested two core solutions to raise the importance of HR and share information and resources.

- ◆ Public sector funders providing operating grants to organizations should require that in their application the organizations submit their human resource plan as well as their financial and artistic/program plans.

This was one of the strongest areas of consensus at the Chalmers conference. Its purpose is, as one participant said, to "facilitate a mindset change" by reinforcing and strengthening the emerging interest in HR issues within the sector, specifically by requiring that the board and staff of cultural organizations make a serious commitment to work together to develop HR policies and procedures.

Participants acknowledged that many (possibly most) not-for-profit cultural organizations do not have formal HR plans and that this action would require boards and staff to begin serious thinking in this direction. By sending a clear message to organizations that their HR policies and plans will be important in the assessment of their grant application, funders will be taking a concrete step to begin changing behaviour and attitudes.

Participants noted that all public funding bodies take into account the administrative performance of the organizations which apply for operating funding, though assigning it varying degrees of importance. To the knowledge of the participants, however, no government department or arts council has as yet required organizations applying for operating funds to submit their HR plans.

This proposed core solution will need to be developed in greater detail, but it was strongly endorsed at the conference.

- ◆ Sharing HR policies, best practices and professional HR management

Recognizing that few not-for-profit cultural organizations in Canada, other than the largest and those which are operated by or affiliated with governments, have a human resources professional on staff or contract and that many have not yet developed formal HR plans and policies, the participants made a number of specific recommendations for increasing the sector's HR capacity. These included the following:

- ◆ large organizations in the sector which have a professional HR manager should share their manager with or contract the manager's services to a group of smaller organizations;
- ◆ large organizations with a professional HR manager should provide a training conference for those who manage people in smaller organizations, to provide information and share best practices;
- ◆ organizations with formal written HR policies and procedures should share these with other organizations;
- ◆ arts and museum service organizations should collect the HR policies and procedures of members and post them on their web site;
- ◆ service organizations should put an HR professional on retainer to provide professional assistance to their members;

- ◊ service organizations should provide incentives for younger and newer managers to take part in their annual conference and, where there is interest, offer special sessions for them;
- ◊ cultural organizations should put an HR professional on their board, to provide assistance in developing HR policies and practices;
- ◊ smaller organizations should consider sharing an HR professional;
- ◊ cultural organizations should explore and, where they can, expand the use of popular low-cost benefits for staff and artists, such as flex time, time off between Christmas and New Year's, tickets to performances and exhibitions, work sharing or partial work-at-home arrangements, half-day Fridays in summer with longer hours the rest of the year, staff-wide strategic planning sessions, etc.

The National Arts Centre, as a large organization which employs HR professionals, has indicated its interest in sharing information and expertise with other arts organizations.

3. Group Pension and Insurance: Investigating and Setting up a Benefits Package

Participants urged that means be found to provide benefits packages (pension and insurance) for the many managers, artists and other cultural workers who do not have benefits through their employer or because they are self-employed. This is a particular problem for the organizations in the sector which are so small (under six people) that they cannot purchase benefits.

Some arts service organizations (such as the Alliance for the Arts and Culture in Greater Vancouver and SaskCulture Inc.) offer benefits packages to members. In addition, the Voluntary Sector Initiative (a national initiative bringing together representatives of the Canadian not-for-profit sector and the federal government to improve capacity and ways of working together) is undertaking a large scale human resources study which will include developing a common pension plan. The examination of benefits for the cultural sector might profitably be undertaken in close collaboration with the VSI study.

4. Emerging Leaders Initiative: Developing a Useful Internship/Mentorship Program for Cultural Managers

Participants were unanimously agreed that to provide genuine and useful training for emerging managers and administrators, a good on-the-job internship/mentorship program is urgently required. There was wide agreement that most government internship programs are not optimally structured for career and skills development.

Participants defined the following characteristics of a good internship/mentorship program:

- ◊ Relatively long-term (one to ideally two years),
- ◊ Flexible,
- ◊ On-the-job training, with an active mentor or mentors, providing real learning and development with clear outcome objectives for the trainee,

- ◊ Fair remuneration to the trainee and payment to the mentor/mentoring organization,
- ◊ Unrestricted by age (both young people and people entering the profession at other ages should be eligible), and
- ◊ Unrestricted by target groups (such as EI recipients or youth at risk) and themes (e.g., science and technology).

Many participants would like to see the return of CHRC's former Training Initiatives Program, which provided on-the-job internship and mentoring opportunities with cultural organizations without age restrictions. As this may be unlikely, CHRC was urged to develop another program model which meets the characteristics outlined above and work toward its implementation.

Another mentoring initiative which interested the Chalmers participants has been proposed by the Conseil québécois des ressources humaines en culture and the Fonds de stabilisation et de consolidation des arts et de la culture du Québec. It would match up an emerging arts administrator with a senior manager who is planning to retire or leave the job in the next few years. Working together, the senior manager would pass on his or her skills and expertise. Gradually the senior manager would work fewer hours and the emerging administrator take on more as the retirement nears, so that at the conclusion of the mentoring period the protégé is capable of running the organization.

5. Renewal and Reinvigoration: Developing Opportunities for Current Managers

Participants recognized that current managers and administrators now in the work force, whether at the senior or mid-career level, have a strong need for renewal and reinvigoration, to refresh themselves, test new ideas and solutions, avoid burnout, and continue to develop professionally.

These needs are important for managers personally and for the well-being of the organizations which employ them; they are urgent and compelling in all disciplines and sizes of organization.

Two core solutions were proposed: one involves short-term renewal opportunities which take place while the manager is fully employed, while the other is longer-term and includes an actual sabbatical from work.

- ◊ "Sanity Circles": Developing Local Disciplinary or Cross-disciplinary Support Networks for Managers

A number of service organizations provide what one gallery director consulted in this project called "sanity circles" - local disciplinary or cross-disciplinary support groups for peer-to-peer networking. These may arise spontaneously in a city or be organized by a local group of administrators or a service organization. They can range from the very informal - e.g., a group of managers sharing a drink at the bar on Friday after work - to more structured, learning-oriented, facilitated seminars or workshops taking place over a short period of time, usually a 1-2 day period or a weekend. These opportunities may be repeated over the course of the year but do not require an absence from work. Their essential quality is that they provide peer-to-peer networking support.

In addition to the networks and professional development activities organized by most service organizations at their annual conferences, some current examples of "sanity circles" include: the Arts Learning Network, a pilot project sponsored by PACT, Opera.ca, and Orchestras Canada in Toronto for senior performing arts leaders using roundtable discussions and on-line communications; the "PD Days for the Arts and Culture" organized by the Arts and Cultural Industries Development Team in Winnipeg; and the periodic professional development sessions hosted by and for a group of Edmonton arts administrators. There are similar opportunities in some other cities.

The Chalmers participants recognized the value of peer support networks and suggested that information about them be gathered and circulated so that individuals and organizations interested in establishing or expanding such opportunities have a range of possibilities to consider. In particular, providing more such opportunities may be an appropriate role for arts and museum service organizations.

♦ The "Triple Win" Program: Combining Mentoring, Career Advancement, and Sabbatical Opportunities

For a longer period of renewal and reinvigoration, the Chalmers participants warmly endorsed a sabbatical program suggested by the general manager of a Vancouver theatre company. Here is the manager's proposal:

"I would like to have the opportunity to have a younger theatre administrator, from our company or another, shadow me and be mentored by me for the cycle of the company's work - say 8-9 months - learning how to be the general manager of this organization. At the end of that time, I would take a 6 months sabbatical at reduced salary, and the person I mentored would act as the GM.

I would have time off to be reinvigorated and refreshed; my company would be in secure and competent hands during my absence; and an emerging leader would have the benefit of on-the-job mentoring and career advancement - it's a win-win-win situation."

As Annex A indicates, there are typically a number of obstacles to managers' taking time off from their jobs for professional renewal: lack of money (budgets for staff development are often limited or non-existent), lack of time, and a work environment which does not value ongoing learning.

Perhaps the most serious impediment is that the manager, particularly one at a senior level, cannot consider taking time off for a real break unless his or her organization can be left in the hands of another capable person. For reasons suggested in Annex A, that resource is often not available in our organizations - because there are too few employees; because they are already overworked, or because the staff positions which in the past developed future leaders were eliminated during the period of government cut-backs.

Any serious attempt to provide significant professional renewal opportunities for senior managers has to solve the problem of continuity in the organization. The manager simply will not leave the organization if there is doubt about the quality of management in

the interim. For that reason, the Chalmers participants endorsed this sabbatical proposal as a brilliant three-way win for all parties: the senior manager, the emerging leader, and the arts organization itself.

A variant of this proposal is a sabbatical program for senior not-for-profit leaders in the arts and social services run by the Durfee Foundation in Los Angeles. The foundation provides stipends and expenses of up to \$30,000 US for each leader to allow them to leave their jobs to travel, write, reflect or otherwise renew themselves. Simultaneously, it provides up to \$5,000 to the candidates' employing organizations if they are willing to establish a permanent revolving fund for professional staff development, to allow other staff to have future access to training or short-term leaves.

Interestingly, there are only two major obligations in this program: the senior manager **has** to take at least two consecutive months off, and the employing organization **has** to maintain a permanent line item in its budget for staff development.

Core Priority Solutions by the Responsible Organization/Group

As mentioned above, the Chalmers participants agreed strongly that, to solve the identified problems, we need a coordinated, integrated approach which draws on all key resources and stakeholders. This section lists the core solutions outlined above by the specific stakeholder organizations and groups to whom they are addressed.

1. Solutions Recommended to Sector Organizations

- ♦ For national arts service organizations, collaborate with the Department of Canadian Heritage and Human Resources Development Canada in undertaking and distributing the results of a comprehensive national compensation survey (see below).
- ♦ For national arts and museums service organizations, collaborate with Human Resources Development Canada and the Cultural Human Resources Council in CHRC's research on opportunities and options for group benefits packages (pension and insurance) for managers, artists and other cultural workers (see below).
- ♦ For the Canadian Conference of the Arts, as the cultural community's representative in the Voluntary Sector Initiative, take part in the development of the human resource strategy for the sector, including the development of a common pension plan, ensuring the plan's appropriateness to the cultural sector, providing linkage with the benefits research identified above, and keeping the cultural community informed about the VSI initiative.
- ♦ For service organizations, maintain and, where possible, expand opportunities for managers to meet, network, take part in short, focused professional development sessions ("sanity circles"), and share solutions to common problems.
- ♦ For service organizations, collaborate with CHRC in making formal HR policies and procedures available to members (see below).
- ♦ For arts and museum organizations, institute HR policies and procedures, devote some money annually to staff training and professional development, and explore possibilities for sharing the services of an HR professional or putting one on the board.
- ♦ For provincial and municipal service organizations, investigate the need for and interest in a retainer arrangement whereby several small and medium-sized organizations can share the services of an HR professional, and explore the need for and interest in "cluster" or "shared" management services which undertake administrative and management tasks for small cultural organizations and individuals.
- ♦ For the National Arts Centre or other interested large organizations with a professional human resource manager, explore with CHRC and the relevant national service organizations the possibility of hosting a national meeting for managers with HR responsibilities to share information and improve the sector's knowledge of the subject.

2. Solutions Recommended to Public Sector Funding Agencies and Departments (includes the Canada Council for the Arts, the provincial arts councils, the Department of Canadian Heritage and, where relevant, provincial ministries)
 - ♦ In programs providing operating funding to not-for-profit arts organizations and museums, require that the organizations submit their human resource plans as well as financial and artistic/program plans in their grant applications.
 - ♦ Recognize the need for and, as means allow, increase budgets for programs which provide core funding to arts organizations and museums.
 - ♦ Ensure that operating grant criteria are comprehensive and holistic, based on the organization's total performance (artistic program, organizational, managerial and financial health), and treat appropriate compensation and staff training and development as legitimate core operating costs.
 - ♦ Examine the need for measures to encourage new entrants in administration and management from Aboriginal and culturally diverse communities and new immigrants to Canada.

3. Solutions Recommended to the Department of Canadian Heritage (in addition to the above)
 - ♦ Propose that the Government of Canada renew the *Tomorrow Starts Today* investment in the arts and heritage sector (the major infusion of resources announced in May 2001) following completion of the current three-year funding.
 - ♦ In assessing the *Tomorrow Starts Today* sustainability programs prior to their renewal, examine specific improvements that can be made to better meet the needs documented in this report and make appropriate program revisions.
 - ♦ In a financial partnership with HRDC, provide funding for and oversee a comprehensive national compensation study of management and administrative personnel in not-for-profit arts organizations, working with the relevant national arts service organizations, and ensure that the results are widely disseminated.
 - ♦ Organize a meeting which brings together the federal, provincial and foundation funders of arts stabilization, capacity-building, organizational development and mentoring programs to 1) share information and best practices and improve coordination among the programs, 2) consider how to ensure that the consultancy plans developed through the programs can be implemented by the organizations, and 2) explore means of increasing the supply of good mentors in Canada.
 - ♦ Invest in effective, bilingual on-line learning materials for cultural managers.

4. Solutions Recommended to the Canada Council for the Arts (in addition to the above)
 - ♦ To honour and validate the management profession, establish national awards with cash prizes to recognize the work of distinguished experienced managers and their protégés (upcoming managers selected by the senior winners).
 - ♦ Develop and administer a sabbatical program along the lines of the Triple Win Program outlined above, combining a sabbatical break for a manager, a mentoring and career advancement opportunity for a younger or more junior manager, and continuity in the management position.
 - ♦ Provide funding to national arts service organizations for effective peer networking and professional development projects for managers/administrators.
 - ♦ Examine the possible need for "flying squad"-type programs in music, visual arts, media arts, and writing and publishing. Over the longer term, examine how to integrate the objectives of the flying squad programs in the operating grants to arts organizations. (see above)

5. Solutions Recommended to the Cultural Human Resources Council, Human Resources Development Canada, and Provincial Cultural Sector Human Resource Organizations
 - ♦ For HRDC, in a financial partnership with DCH, provide funding for a comprehensive national compensation study of management and administrative personnel in not-for-profit arts organizations.
 - ♦ For HRDC, provide funding to CHRC for research on opportunities and options for group benefits packages (pension and insurance) for managers, artists and other cultural workers.
 - ♦ For CHRC and HRDC, investigate means of validating and increasing the professionalization of cultural management such as certification, accreditation, competency development, and benchmarks/best practices and advise the cultural community on the most appropriate model or models.
 - ♦ For CHRC and HRDC, examine the possibility of and develop a model for an internship/mentorship program for cultural managers which fits the needs for skills and career development as outlined above under the Emerging Leaders Initiative.
 - ♦ For CHRC, in collaboration with national arts and museum service organizations, develop and disseminate formal HR policies and procedures for use in not-for-profit cultural organizations.
 - ♦ For CHRC and its provincial counterparts, develop informational material on and include cultural managers in the promotion of careers in culture.

- ♦ For CHRC and its provincial counterparts, inform students in university fine arts programs and artists' training institutions about management as a career option, possibly in the context of a course on careers in the sector.
- ♦ For CHRC and its provincial counterparts, develop and promote informational material on cultural management as a career choice for secondary and post-secondary students.

Recommendation to the Partners in the Creative Management Project

Participants at the Chalmers conference thanked The Samuel and Saidye Bronfman Family Foundation, the Canadian Conference of the Arts, the Cultural Human Resources Council and the Department of Canadian Heritage for their support of and commitment to the Creative Management project.

The partners were urged to continue to support and work on the project through the next two phases, specifically to develop a detailed action plan and to advocate diligently and persistently for its implementation.

ANNEX A: THE CHALLENGES

This analysis of the fundamental challenges to keeping experienced managers in the work force, providing opportunities for their professional renewal, and attracting and retaining the next generation of leaders is based on the consultations and research undertaken for the project, including the discussion at the Chalmers conference.

Respondents defined several major barriers or gaps, with a number of sub-points. The section is structured under the following challenges:

- ♦ Structural and Attitudinal Realities,
- ♦ Compensation and Working Conditions,
- ♦ Attracting the Next Generation,
- ♦ Diversification and Representation,
- ♦ Training and Professional Development,
- ♦ Professionalizing Human Resource Policies and Management, and
- ♦ Funders and Boards.

The major conclusions reached by the respondents are framed, with further explanation and direct quotations added to provide detail and depth.

1. Structural and Attitudinal Realities

The profession of arts/heritage manager is a relatively young one and it tends not to be understood and valued by trustees, artists and sometimes managers themselves. Its importance to artistic success, organizational stability and the connection with the public is often unrecognized.

Many respondents who are themselves arts and museum managers pointed out that they are part of the first generation of professional cultural managers in Canada. As one festival producer put it,

"I'm a member of the first generation in Canada to spend a whole career as a professional arts manager. Most of us are still in the workforce."

Formal post-secondary education in cultural management (arts and museums) has been widely available in Canada only in the last 20-25 years. Depending on the size and complexity of a cultural organization, cultural management can encapsulate many diverse specializations (from general management to marketing to development, communications, media relations, personnel management, financial planning, education and community outreach, membership and volunteer management, board management, strategic planning, government relations, etc.).

The relative youth of the profession as a subject for formal education and its diversity may help explain the view reiterated by a large number of respondents, managers, educators, funders and consultants alike, that the profession is poorly understood and largely under-

valued within the sector. Respondents also pointed out that the under-valuing of "administration" is endemic in mission-driven organizations, whether they are faith-based institutions, charities or arts and cultural organizations, a point frequently made in studies of the voluntary or not-for-profit sector in general.

As one public sector funder explained it,

"The tendency in arts organizations is to put any spare resources into production, the work on stage, the program. There's an inherent bias against spending on the administrative side."

Another public funder pointed out that:

"There's some resentment from artists about anything that takes dollars away from artistic production. This has an impact on attitudes about the work of managers. If the manager is not over-extended, he or she is resented. How can we break down this attitude?"

One educator said:

"I know people who think that administration is the antithesis of art and artists who think of the manager as a necessary evil."

A number of respondents pointed out that these attitudes are deep-seated and ingrained in the overall culture of the sector. One performing arts manager captured the perspective of a good number of those consulted in remarking that:

"Boards of cultural organizations assume the values of the sector; so do the funders. And our sector is dominated by keeping the art on stage and balancing the budget."

A number of participants at the Chalmers conference added another possible explanation of the under-valuing of administrative functions in cultural organizations: the fact that these positions are predominantly filled by women, who tend even today to earn less than men in comparable jobs.

However respondents defined the root causes of the under-valuing of arts and museum managers, there was strong agreement that this attitude is deeply destructive to current managers, to the possibility of attracting another generation of managers (men or women) and to cultural organizations themselves.

One dance manager summed up the general view, which was reiterated by many respondents:

"It is absolutely essential that all the people in our organization understand the value of the roles each and every member of the team plays. Yes, those roles are different, but every one of them is vital to the survival of the company."

The environment in which arts and heritage managers work has undergone revolutionary change in the last decade. Managing a not-for-profit arts organization or museum is extraordinarily complex and demanding, requiring new and sophisticated skills.

The study of performing arts managers referred to earlier provides an excellent summary of how cultural management jobs have changed and the new demands on them:

"An increasingly complex operating environment over the past decade has resulted in a shift from a relatively known and dependable system of government investment and support to a system that is volatile and unknowable.

Deficit-driven agendas at senior levels of government have resulted in the devolution of greater responsibility for the arts and culture to market forces, to private sector sponsorship, and to local government.

Increased competition for charitable and sponsorship support across the voluntary sector and aggressive fundraising by such traditionally well-funded public institutions as universities and hospitals have drawn substantial sums away from less well-funded areas such as the arts and culture.

Growing ethno-racial and cultural diversity in communities challenges many existing cultural institutions originally established to serve a more specific (largely European) set of cultural traditions.

Changing demographics and decreased discretionary income and time in the midst of an expanding set of leisure time options challenge cultural institutions to maintain existing audiences and to develop new ones.

The impact of new technologies, . . . while extending access to some forms of cultural expression, also results in declining attendance in some traditional parts of the sector."⁶

To this description, a group of students now studying cultural management posited some additional developments which place new demands on the manager:

- ♦ the reduction of arts education programs in the schools,
- ♦ the aging of audiences,
- ♦ the development of e-commerce and advanced database software for fundraising,
- ♦ political regimes that do not support the arts,
- ♦ the decline in volunteering,
- ♦ the visually stimulating computer and multi-media entertainment products on which young people are raised, and
- ♦ higher and higher expectations for customer service standards.

One public sector funder summed up the new work imperatives in this way:

"What it means is that managers have to work differently today - to work collaboratively, across organizations, disciplines, sectors; to develop partnerships; to work with less government money, with better business practices; to diversify revenues, develop new audiences, and meet increased pressures for accountability."

There is no doubt that these environmental changes have affected all professionals in the sector, including artistic personnel and technical staff. But the changes have been experienced most profoundly by management personnel, who have the chief custodial responsibilities for their organizations' development, stability and survival.

During the consultations, a public sector funder advanced the trenchant opinion that:

"The general manager or executive director or general director position, as it has evolved over the last 10 years, is simply no longer do-able. No one person, no matter how gifted and educated, can do it all."

While the managers we consulted did not put the issue so dramatically, many reflected on the super-human expectations of the job. Here are some observations from a media arts administrator and two orchestra managers:

"By being really successful - doing a lot well with almost no resources - all we do is raise the bar. Everyone comes to expect this level of achievement all the time - our boards, the funders, the artists. If we can't repeat it, we're considered failures."

"The manager is expected to create miracles."

"There's a magical view of what executive directors can do. When they fail, they're demonized."

The ethical obligation to respect and treat artists appropriately is one of the hard-won achievements of Canadian cultural policy and a goal which has been internalized in the organizational values and behaviour of arts organizations and public sector funding agencies. As yet, such a transformation in policy has not occurred regarding management personnel.

A number of respondents pointed out that over the years Canadian arts service organizations, professional associations, and unions have advocated and worked for recognition of the role and importance of the artist, the need to compensate artists appropriately and to provide protections for their health and safety. While this struggle is far from over - artists' incomes are still inadequate, sometimes deplorably so, and they lack access to social benefits that are taken for granted by other Canadians - the arts community has come to accept as a matter of ethics and public policy an obligation to treat artists properly.

This obligation is deeply internalized in the culture of arts organizations, among boards and managers, and it plays an important role in the criteria used by most public funding bodies in assessing applications for operating funding.

Said an orchestra manager, reflecting a view raised by many of those consulted:

"We are justifiably proud that artists have become more professional, with improved pay and working conditions. Unions, associations, labour agreements and even the attitudes of the funding agencies help protect artists' rights in the workplace. We haven't done this yet for managers."

An arts service organization concluded that:

"Our next task must be to professionalize our treatment of managers and administrators."

As managers are beginning to admit, they are in some cases their own worst enemy - accepting the under-valuing of their profession and acceding to unreasonable working conditions and pay. There is an increasing awareness that managers have to take responsibility for changing attitudes, beginning with their own.

A variety of comments, respectively from a dance manager, an arts service organization, an orchestra manager, and a cultural consultant, will indicate the widespread realization that managers need to embrace change.

"We suppress our own professional needs because we feel no one else can run our organizations. We must find ways of helping ourselves."

"We pride ourselves on over-working - that's sick. We have to stop encouraging this situation."

"It would scare me to bring a new generation to the business as it is today."

"What is needed is a value shift - not just by the boards but managers themselves."

2. Compensation and Working Conditions

Traditionally, compensation in the not-for-profit cultural sector (whether for artists, managers or technical staff) is low, sometimes very low, in comparison with positions in other sectors requiring similar education, training or experience. In many arts organizations and museums, current rates of pay and benefits, exhausting working conditions and limited career development opportunities are driving managers out of the work force and making it difficult to replace them.

While respondents recognized that people work hard in many sectors of the economy and that other not-for-profit workers also feel underpaid, virtually every one consulted in this project identified compensation and working conditions as a major issue for current and future management personnel.

A recent national compensation survey carried out for the Canadian Museums Association found that, for both large and small museums, "The most significant challenge in attracting and retaining qualified resources was their limited ability to pay competitive salaries."⁷

One performing arts manager described the issue this way:

"I'm increasingly aware that conditions of employment in our sector are a major hindrance. When we're young, we get into this field because we love the arts so passionately we're willing to forego ordinary rewards. As we get older, it's more obvious that our skills are not valued in any of the ways operative in the outside world - in pay, in respect - so people come to their senses and leave, for government, for business, or other non-profits."

National statistics on the salaries and compensation of management and administrative personnel across not-for-profit arts organizations and museums are not available. Information from Statistics Canada, whether from the census, cultural labour force data, or the surveys of heritage institutions and performing arts organizations, does not provide this degree of specificity.

There are two standard occupation classification groups used by Statistics Canada which explicitly relate to culture managers: "Library, Archive, Museum and Art Gallery Managers"; and "Managers in Publishing, Motion Pictures, Broadcasting and Performing Arts". Unfortunately, these occupational groups cannot be further disaggregated, and it is probable that the individual constituent parts of the groups have different average salary levels.

In addition, some arts and cultural manager positions are included in other occupations not specific to culture. Arts Administrator, for example, is a category within the occupation group "Other Administrative Services Manager". Finally, as is well-known, Statistics Canada's data-gathering in the not-for-profit media arts field and in visual arts (outside art galleries) is still under-developed.

At a discipline level, the most recent comprehensive study is the national compensation survey by the Canadian Museums Association. Other existing surveys which are publicly available include a 1997 study of art gallery compensation by the Canadian Art Museum

Directors Organization, a compensation survey by the Professional Association of Canadian Theatres, also done in 1997, recent studies by the Conseil des arts et des lettres du Québec (CALQ) of performing, visual and media arts organizations receiving CALQ funding, which include compensation information, and a study of Nova Scotia performing arts organizations which also includes such information.⁸

A survey of opera company compensation by Opera America has limited public availability (it is provided only to the general directors of the member companies, which include both American and Canadian organizations). A survey undertaken by Orchestras Canada of many aspects of orchestral revenues and expenses includes compensation information, but it is also confidential.

Our review found no national compensation surveys of managers/administrators in dance, the media arts, and the contemporary visual arts (other than art galleries). Even the surveys which do exist do not allow for comparisons on a cross-disciplinary basis and are from different time periods with different methodologies.

While it is difficult in the absence of definitive and comparable compensation information to reach exacting conclusions, the surveys which do exist confirm the conclusions reached by respondents that:

- ♦ Within the not-for-profit arts and heritage sector in general, salaries tend to be low.
- ♦ Larger budget organizations usually pay better than mid-sized and considerably better than small-budget organizations (some small-budget organizations pay so poorly that in effect the employees - often a single employee - are really volunteers).
- ♦ Among the disciplines and arts practices, there appears to be a link between longevity as recipients of public sector funding and salary levels.
- ♦ Even among the largest organizations, staff below the level of the senior-most positions are often poorly paid.

Respondents to this project expressed great interest in obtaining factual information on compensation in their discipline and, as possible benchmarks, information about what comparable positions in other sectors pay. The following positions were suggested as worth exploring for comparisons: arts and policy officers in governments and arts councils, university faculty, and managers and administrators in not-for-profit professional associations in other sectors, social service agencies, health care facilities, and colleges and universities.

Several respondents pointed out that good information on current compensation is useful in advancing the case for improved pay with boards of trustees, who, as one said, "tend to want to keep the numbers of administrative staff and the compensation costs as low as possible."

Some managers reported that salary surveys have helped them persuade their boards of the need to increase pay levels for staff, as this comment from a gallery director indicates:

"With the CAMDO survey, I managed to convince the board our staff deserved a significant salary increase, but their initial reaction was 'no, these people chose to work in the arts.' The first priority in working with the board is to inform them about the high degree of specialization of management personnel We have to increase salaries to attract the talent we need."

At the senior levels, arts and museum management positions are increasingly international. As a consequence of greater trade and labour mobility between sectors and countries, managers have more opportunities to leave for better-paying jobs here and abroad. Respondents to this project easily reeled off lists of names of experienced colleagues who have taken better-paying jobs in other countries, and the potential rewards of such ventures were captured in an anecdote by this performing arts manager:

"I was offered a job in the United States last week, at twice the salary with half the taxes. I turned it down, but you can understand why someone would be attracted."

There is a high degree of stress and burnout among current managers, and many are taking early departures from the arts and heritage workforce. Reports from a number of respondents indicate a high degree of staff turnover with serious consequences for the individuals and organizations concerned.

Among those consulted, stories about the loss of mid-level and senior managers to better paying and possibly less strenuous jobs elsewhere - in the cultural industries, universities and hospitals, governments and arts councils, consultancies, and for-profit businesses - were legion.

Some organizations reported losing people in competitive professions such as marketing and development almost annually. Many reported grave difficulties in filling key administrative positions.

Comments like the following from an arts consultant, a theatre manager, an orchestra manager, a performing arts service organization and a media arts service organization were typical across disciplines, regions and organizational sizes:

"The rate of turnover is accelerating as general managers resign because they are exhausted or overwhelmed and decide to 'get a life', or are 'let go' because of a conflict with individual directors of the board and/or the artistic director. "

"We lose mid-level managers to better paying jobs elsewhere all the time."

"Below my level, the salaries in this organization are utterly inadequate - we ask people to work 55 hour weeks for \$28,000 a year. People love the work but they can't pay their bills. After two to three years they burn out and leave, and we find someone else to accept the situation. Our new board chair was horrified by the staff conditions and pay - he asked me, 'how do you get anyone to work here?'"

"We train people for career path jobs in critical administrative positions in our organizations, only to lose them to other sectors. And then we hire again and retrain again."

"When knowledgeable people leave, many media arts centres have to start over again when they hire a new director."

Respondents were overwhelmingly agreed that, while some turnover is healthy for an organization, the costs of the huge turnover endemic in the sector are enormous. A performing arts service organization said:

"Turnover impacts on everything - it undermines the stability of the organization and its ability to implement any long-term plans."

An educator concluded, sadly,

"They leave because of burnout. Passion brought them to the job and lack of passion drives them out."

Reflecting the fact that many of the problems facing managers are not unique to Canada, a Harvard Business School professor recently characterized the treatment of staff turnover in U.S. cultural organizations in these harsh words:

"The tacit contract goes something like, 'you're serving a noble cause and we are without adequate resources; therefore we don't have to create interesting and rewarding work environments.... We're going to just work you until you burn out. As soon as you burn out, there'll be someone else,' and that is true because it's a sexy field to go into. The reality is, the cost to the sector is enormous. The lost talent is incalculable. Turnover and demoralization is a source of significant inefficiency in many arts organizations."⁹

3. Attracting the Next Generation

In the past, the cultural sector was blessed with an abundant supply of workers and the spectacular growth in the cultural labour force in recent decades paralleled the baby boomer generation. But within the next decade, there will be a heavy turnover of senior leaders, and the "replacement" generation coming along will be smaller. Under the best of circumstances, there will be intense competition for competent new workers. This new generation, because of its small size, high degree of education and technological skills, is likely to have its pick of good jobs.

In 1996, there were 4.2 million 35- to 44-year-olds in the Canadian labour force. These people will be replaced by a younger generation of only 1.9 million born in the 1990s. According to Canadian labour market expert Graham Lowe, this is "the first time a retiring cohort will be numerically larger than the replacement generation."¹⁰ As one young manager consulted on this project said, "In 15 years, Canada will have a million fewer workers."

In addition, Canadian university students have an average debt load of \$25,000 when they graduate. As a journalist pointed out, this is "one of the very highest student-debt levels among industrialized countries."¹¹

Unfortunately, one way arts and heritage organizations coped with government cutbacks in the late 1990s was by reducing staff and eliminating many entry-level career-path jobs (e.g., the assistant or associate to the general manager positions), which were traditionally a means for developing future managers. Ironically, the sector diminished its capacity to develop potential leaders just as doing so was becoming more urgent.

Commented one performing arts service organization:

"Grant cutbacks have impacted most substantially on what were traditionally used as management training positions. In many cases, we simply do not have people in those positions who are prepared for senior leadership jobs."

A number of detailed Canadian research studies produced in recent years provide a clear picture of what young Canadians want from a job. With slight variations, they show that they are looking for (in priority order) interesting work, competitive wages, opportunities to work in their field of study, a good work-life balance, long-term job security, and chances for career advancement and ongoing professional development. On balance, only interesting work and possible opportunities to work in the field of study bode well for not-for-profit arts and heritage organizations.¹²

Both experienced and new managers remarked, virtually unanimously, that what brought them to arts management was a "passion" for the subject matter. In the words of an experienced festival manager:

"The work environment is creative and stimulating; I'm able to experience great art; I can enjoy watching happy audiences; I can collaborate with other people and sectors, and I'm always surrounded by artists passionate about their work."

But it is clear from consultations with young managers, students preparing for management careers, their teachers and employers that unless there are significant changes in the sector, in its compensation, working conditions, human resource practices, and organizational values, it will have grave difficulty attracting and retaining another generation of competent and committed managers.

Typical comments by young managers and their teachers included the following:

"I love this so much I will try to stay. But I might leave if I need a better salary or it stops being fun."

"Compensation is the key issue for me and that includes time off for professional development."

"I want to stay in the arts but lack of benefits is a problem - I'm a single mother and I also want opportunities to keep learning."

"I like this job a lot. Staying in it? That probably depends on how much abuse I can take."

"My students tend to go into the commercial cultural industries, where there are more work opportunities and significantly better pay."

"Most of our graduates go into the cultural industries. Why would they be attracted to arts organizations? What they see there are tired, burned out, dysfunctional places."

One young manager summed up what it will take to encourage young Canadians to become arts and heritage managers:

"A creative environment, team work, reasonable working conditions, reasonable salaries, benefits, a healthy balance of work and life, and opportunities for mentoring and professional development on the job."

Many respondents pointed out that compensation demands are rising and will continue to rise because the new entrants to the work force are well-educated, have strong technological skills, and need salaries big enough to allow them to pay off their debts.

One cultural consultant, echoing a view expressed by many respondents, said:

"We've got to face the harsh reality - we won't attract a second generation without providing greater resources in administration. For that to happen, the funders have to balance their arts focus with attention to human resources and organizational needs. It's time to attend to our human deficits."

One educator concluded:

"We'll always have artists - the will to make art is simply so strong. But I'm not so certain about managers."

4. Diversification and Representation

To reflect and represent the evolving demographics of the Canadian population and audiences, Canadian arts and heritage organizations need to attract young managers from culturally diverse and Aboriginal communities.

Many respondents observed that the sector must do a better job in attracting managers from culturally diverse and Aboriginal communities. While noting that cultural management programs, especially those located in major metropolitan areas, have been successful in attracting culturally diverse student bodies, they suggested that keeping these graduates in the not-for-profit arts and heritage - and attracting managers from Aboriginal communities - will require the improved conditions outlined earlier.

Respondents raised three particular reasons for concern about the diversification and representation of cultural managers. First, the sector work force is not representative of the increasingly diverse population of Canada. Second, population growth in Canada is now deriving almost exclusively from immigration, while Aboriginal youth represent one of the only large cohorts in the next generation of workers. Third, at present there are few role models for culturally diverse and Aboriginal managers.

Two service organizations commented:

"The homogeneity of our work force - its lack of diversity - is one of our major failings as a sector."

"Immigration will be essential to all work forces in the future, and it will come heavily from developing countries - how can we position our field here?"

A public funder pointed out that

"920,000 Aboriginal youth will be entering the work force by 2006, but there is no tradition of Aboriginal people becoming arts managers. We may need special programs to encourage their participation in the work force."

One young culturally diverse manager said,

"Why would young people of colour, seeing almost no one of colour in senior arts management, join the profession? We need good mentoring opportunities for young entrants to help address the under-representation of culturally diverse people in our field."

The final words on the subject of the next generation are those of an arts consultant, who summed up a number of points in a letter to the coordinator:

"Boards entrusted with running arts organizations must come to recognize that there is more on offer for women, that there are wider possibilities for all graduates, that the reflection of cultural diversity on boards and in staff are urgent matters. . . . We will not attract qualified individuals to our field with the state it is in today. It is our job to make it ready and attractive. Once we have done that, I believe the bright upcoming generation of qualified arts managers will flock to work for and with artists in our country."

5. Training and Professional Development

Training and professional development for arts and heritage managers take place through formal management training programs offered by colleges, universities and other specialized institutions; apprenticeships, internships, and mentorships (AIM), some of which occur on-the-job; and ongoing short- and long-term professional development opportunities. While Canada has many excellent formal education programs in the arts and museum management, provision is uneven across the country, and some provinces lack access to one or both. Additionally, advanced level leadership development courses for senior arts and museum managers are not available in Canada.

Among the respondents to this project, there is widespread agreement that at the level of formal education in arts and museum management, Canada has many high-quality programs. The major problem is the unevenness of education provision across the country: some regions of Canada have no arts or museum management programs. Preliminary work has begun in Manitoba, New Brunswick and Newfoundland on the possibility of establishing formal programs in cultural management, and distance and on-line learning, while at any early stage of development, is likely to become a more important part of the education and ongoing learning of managers as time goes on.

While respondents to this project generally acknowledged the excellent overall quality of cultural management education in Canada, some pointed out that the country lacks advanced level leadership development opportunities. Museum managers mentioned the Museum Management Institute at Berkeley as an example of effective advanced training for senior leaders.

Three particular problems were identified by the respondents: the limitations of available internships for new entrants; the limited supply of experienced mentors; and the barriers to ongoing professional development for those working in the field.

Internship programs are in constant use by arts and heritage organizations but most are not optimally structured for developing the career of the individual or the strategic development of the organization. The particular difficulties of most government internships are: their limitation to people ages 30 and under; their thematic restrictions (e.g., science and technology); and their generally short duration.

Respondents agreed wholeheartedly that, while they are happy to have internship programs available and, in the words of one opera manager, "take advantage of every intern program we can," most internships are not strategically structured for the career development of the individual.

Most government internships are limited by age (to people 30 and under), focused on unemployed or underemployed youth, sometimes oriented around a given youth employment strategy theme (e.g., international, science and technology, etc.) and fairly short in duration (typically, six months or less). Respondents unanimously concurred that longer internships, with better pay and expanded age parameters, are desirable in the cultural sector and far more likely to lead to career development and ongoing work for the interns.

One young intern, currently benefiting from a rare two-year internship in culture, described the situation this way:

"There are very few entry level jobs in arts and heritage with career prospects. But there is an abundance of such jobs in other sectors. As a result, internships in arts and heritage have to be good, sufficiently long for real training to occur, and competitively paid if they are to attract the best candidates."

A public funder remarked that:

"We aren't training for the future if the new jobs are entry-level and don't last or lead anywhere."

Asked about their preferred length of internship, most respondents indicated that a one to two year period would provide genuine and lasting job-related development for the intern, while the minimum required is eight to twelve months. An educator commented,

"Students need a substantial apprenticeship after graduation - an 8-12 month position in an arts organization with real training. In most internships, the money and length of time are both inadequate. To be in a job and be mentored - this is the critical need for the career development of the cultural manager."

A number of respondents whose organizations received funding from the former Training Initiatives Program of the Cultural Human Resources Council - or who had themselves been mentored through those funds - expressed the need for a similar program available on a national basis which would provide mentoring and training opportunities for young people and those in mid-career, be unrestricted by themes of limited usefulness in the arts and culture, and be delivered by sector service organizations and professional associations. The CHRC Board has recently endorsed the need for a TIP-style program.

In defining "internships that work", respondents consistently cited the following factors: real opportunities to learn on-the-job, access to a good mentor, and training that involves learning leading to career development and advancement.

Mentorship is one of the preferred means of learning and development in the arts and heritage sector, a fact reaffirmed by the project consultations. Concern was expressed, however, that, in comparison with the needs, we have a limited supply of experienced mentors and run the risk of burning them out through over-use.

Experienced mentors are in great demand in the sector, and many mentorships involve negotiating complex and difficult human resource and "relationship" issues within the organization as well as helping individuals grow and develop. Mentors indicated that in such situations they can serve only 2-3 organizations at a given time.

One young manager in her mid-twenties, who has already been called on to mentor new groups of emerging artists, noted that the demand for mentors is so strong that "even people my age need to acquire mentoring skills."

There are a number of obstacles to experienced managers' taking advantage of opportunities for ongoing professional development and renewal, including time, money and attitudes.

Recent studies in the sector emphasize the degree to which opportunities for staff training and professional development have declined or been neglected in recent years.

The CMA's compensation survey found that:

"Many [museums] are faced with the challenge of securing adequate funding for training initiatives Insufficient funds and staff training are relatively common challenges."¹³

A study of new and mid-career managers in the performing arts reported that arts managers tend not to avail themselves of ongoing learning and professional development opportunities and noted that:

"Study participants . . . acknowledge that professional development for managers has not been a high priority in the battle for resources to produce and promote the performing arts."¹⁴

Several managers and public sector funders suggested that the major barrier to ongoing professional development for current managers is the huge workload of the manager's job. One arts consultant said the problem is especially severe for the senior-most manager:

"As the one responsible for the organization, she can't just walk away from it. As a result, because there's no means to take advantage of these opportunities, managers stop looking and don't hear about them."

As one theatre manager concluded, summing up what many respondents said,

"We need to adopt a training development culture and put money into our budgets specifically for staff development. If we don't do this for ourselves, let's for heaven's sake do it for the younger people on staff - they want opportunities to continue to learn."

Respondents to this project confirmed what is widely known in the arts and heritage sector, that managers value mentoring and peer networking opportunities very highly. Many remarked on the importance of annual general meetings and other networking and professional development events organized by national, provincial and municipal arts service organizations.

As one manager put it,

"These meetings help us overcome our isolation; they buoy our hopes, provide us with opportunities to share solutions and help us conquer fear."

6. Professionalizing Human Resource Policies and Management

There is a growing awareness in arts and heritage organizations of the need to professionalize their human resource policies and management and a strong interest in finding means of doing so.

One public sector funder pointed out in our consultations that:

"Many of the most profound needs in these organizations are human resource needs or are exacerbated by HR issues."

A museum manager remarked that:

"The most serious issues in Canadian museums revolve around human resource issues - succession planning, leadership development, the lack of culturally diverse professionals, the shortage of qualified people to become directors."

Except in government-operated or affiliated institutions and a handful of other large organizations, most not-for-profit arts organizations and museums in Canada do not have access to trained professional advice in human resources (on staff or contract), and many lack established, formal HR policies and procedures. Indeed, all indications are, to use the words of a performing arts manager, that "as a sector we have not developed an HR culture."

A major study carried out by the Conseil québécois des ressources humaines en culture, a guide to evaluating the needs and management of ongoing professional development, pointed out that few organizations in the sector have formally defined their HR policies or developed means for managing HR issues. Specifically, most organizations lack a strategic plan for organizational development, job descriptions, and policies in areas such as hiring, compensation, performance evaluation, training and professional development.¹⁵

A study undertaken for the Cultural Human Resources Council came to similar conclusions:

"Many interviewees ventured that the [HR] function does not receive adequate consideration in their organizations In most organizations contacted, having an HR manager was considered a 'luxury' Formally devoting even a part of an individual's time specifically to HR management was seen as 'taking away resources from the primary business function'. As a result, HR management is often practiced by entry and mid-level management or supervisory staff with little or no experience or training in HR management."¹⁶

One of the unexpected findings in the consultations for this project was that there may be a will to change this situation. Repeatedly managers spoke of their need for access to professional HR advice and for information about benchmarks and best practices in HR management and their desire to set up professional HR policies and procedures in their organizations.

Here are the comments of respectively an art gallery director, a cultural consultant, a theatre manager and a media arts manager:

"In my 20 years working in the arts, the complexity of issues related to HR and the time needed for them have grown exponentially. I realize it's dangerous for us to be so unprepared and uninformed. There is more and more labour law, more regulations. Staff are better educated and want more clarity about their working conditions. They expect a humane and modern environment. I think we're reaching the point where we need the help of an HR professional."

"Boards have learned about their fiduciary roles, revenue diversification and accountability. Now they are recognizing the next big step needed - HR policies and procedures."

*"We brought in a full-time HR manager. It was a fantastic break-through. She solves problems before they can grow. She finds dollars, brings in interns, saves money on liability, stretches the existing budget and increases morale and productivity. Ultimately she saves money. This is an investment in institutional change. Sometimes we jeopardize the long-term capacity of the art by **not** investing in human resources."*

"Arts service organizations should provide opportunities for regional or national meetings specifically on HR issues."

While many organizations which want access to professional HR help are not financially able to support a full-time position, their managers reported pursuing a number of options, including:

- ♦ two or more companies sharing an HR manager;
- ♦ the loan of an HR professional from one organization to a number of smaller ones;
- ♦ a service organization arranging a retainer for an HR manager to work for several organizations; and
- ♦ organizations with developed HR policies sharing these with others.

7. Funders and Boards

Boards of trustees of arts and heritage organizations are strongly influenced by the signals that come from the public sector funding agencies which provide their organization's operating funds. If the funders' program objectives and criteria actively encourage healthy organizational cultures, up-to-date human resource policies and practices, and appropriate investments in staff compensation and professional development, that can have a positive impact on the resource decisions made by boards of trustees.

With remarkable frequency, respondents to this project from all disciplines and regions pointed out that boards of arts organizations and museums are strongly influenced by what they believe their major public sector funders "want" and tend to make their planning, programming and expenditure decisions on that basis. Rightly or wrongly, the main messages the boards have taken from the public funders are to balance the budget and cut administrative costs.

In the words of one performing arts manager,

"The message we get is that money spent on artistic production is valuable, but money spent on administration or marketing is wasteful."

Concluded one educator:

"The human infrastructure needed for the production of art has to be seen by funders as a legitimate and necessary part of creating art and bringing it to the public."

Over the last decade, there has been a retreat from core funding by both the public sector and foundation funders in Canada. The balance between general operating grants and short-term, focused project funding has shifted in the direction of the latter, and operating support has often been frozen or reduced. This systemic problem, which affects the entire not-for-profit sector, directly contributes to the precariousness and instability of cultural organizations.

Many respondents pointed out that, as funding has become increasingly irregular and unstable, organizations are kept going by special project grants that were never designed to provide organizational continuity and stability.

In the words of a public funder,

"Organizations are being maintained - just barely - through the altruism of their staff and short-term government grants which aren't meant to be sustaining. This is not good for the organization - how on earth can it plan long-term? - and certainly not good for the people."

Another funder said,

"Part of the strain on managers is that we ask organizations to operate at the edge of insolvency."

Reflecting the changes in the funding structure and their impact on the boards of cultural organizations, an educator commented:

"The basic causes of the stress on managers are twofold - unreliable, precarious granting agencies and unreliable, precarious boards."

A number of interviewees noted favourably that in some parts of the country and some disciplines there has been a recent increase in programs devoted to capacity-building, organizational development, technical assistance, mentoring and consulting services, and professional development opportunities.

These include the arts stabilization programs in various regions of Canada (which all have a technical assistance component), the new Department of Canadian Heritage capacity-building program, the Flying Squad programs in dance and theatre at the Canada Council for the Arts, the Canada Council's capacity building program for culturally diverse arts practices, several programs offered by the provincial arts councils, including the Compass program at the Ontario Arts Council, and some foundation programs.

While these programs differ in detail, they aim to improve the resilience and stability of cultural organizations often through providing outside assistance and advice from a consultant-mentor to help with a problem(s) identified by the organization. Typically the programs deal with issues such as strategic planning, organizational development, board governance, succession planning, change management, development planning, marketing planning, and other targeted problem areas.

The majority of managers consulted in this project appreciate the availability of these programs and believe that, in recognizing the importance of organizational and administrative issues, they respond to genuine needs. But, as the quotations below suggest, respondents voiced a number of concerns:

- ♦ these programs are not available in all regions and disciplines;
 - ♦ where they do exist, greater coordination among the different funding bodies administering the programs could improve their effectiveness;
 - ♦ in too many cases, cultural organizations lack the money, staff, time or infrastructure to implement the changes proposed through a capacity-building consultancy;
 - ♦ lest capacity-building be simply "the flavour of the month", we need to determine how to sustain its objectives in the long term, possibly by integrating them into the main public sector operating grants.
-

As one educator remarked,

"If the current batch of capacity-building programs aren't effective, they won't be repeated again for decades."

An arts consultant and former manager involved with a number of capacity-building initiatives had this criticism:

"Brilliant consultants provide expert advice; devise action plans, marketing plans, etc. for organizations who lack the money, the staff, the tools and the time to implement them. This has a debilitating effect on the entire staff, who feel they've failed to meet their goals, even if those goals were impossible to attain given the circumstances.... The key to success is flexibility and willingness to provide operational dollars to help a company help itself...coupled with outside expertise to jointly identify the best way to effect change."

A number of respondents suggested that the different funding agencies administering capacity-building programs should develop means of sharing information to improve their effectiveness in contributing to organizational development and stability.

Several respondents recommended that, as a longer term development, the objectives and criteria of capacity-building programs should be integrated into the main operating grants provided by the public sector funders, to recognize capacity-building goals as essential to the overall health of the organization and provide greater stability and regularity in the pursuit of such goals.

One public funder commented that:

"Our funding programs are compartmentalized and if you compartmentalize, you actually contribute to the organization's instability."

A cultural consultant made the point that:

"Adequate pay for staff and organizational and professional development have to be built into the economy of the organization, as core operating expenses. This means that they should be dealt with through operating grants. A sustainable organization is one in which all essential aspects of the infrastructure are healthy, developed and resilient."

ANNEX B: KEY INFORMANTS IN PHASE 1

Jeffrey Alexander, Vancouver Symphony Orchestra
Barbara Anderson-Huget, Canadian Artists Representation, (CARFAC) Ontario
Susan Annis, Cultural Human Resources Council (CHRC)
Pierre Arpin, Art Gallery of Greater Victoria
Astrid Augspols, Orchestras Canada
Greg Baeker, Arts and Cultural Planning
Ted Bairstow, Department of Canadian Heritage
Nancy Baker, Human Resources Development Canada
Linda Balduzzi, Ottawa Arts Court Foundation
Meena Ballantyne, Department of Canadian Heritage
Siobhan Barker, Headlines Theatre; Professional Association of Canadian Theatres
Curtis Barlow, Department of Foreign Affairs and International Trade
Lori Baxter, Alliance for Arts and Culture; CCA Board
Eddy Bayens, Edmonton Musicians Association; CHRC Board
Clarence Bayne, Concordia University
Léo Beaulieu, Regroupement des artistes en arts visuels
Alexandre Bédard, Orchestre symphonique de Sherbrooke
Sandra Bender, Canada Council for the Arts
Mireille Bergeron, Groupe d'Intervention multidisciplinaire; CHRC Board
Colleen Blake, Shaw Festival
Philippa Borgal, Canadian Conference of the Arts
Louise Boucher, Conseil québécois des ressources humaines en culture; CCA Board
Pat Bradley, Ontario Arts Council
Dawn Brennan, Vancouver Playhouse Theatre
Dean Brinton, Nova Scotia Foundation for Heritage and the Arts
Marthe Bujold, Canadian Conference of the Arts
Marie Cadieux, CCA Board
Elaine Calder, Edmonton Symphony Orchestra
Fran Cameron, National Gallery of Canada
Donna Cardinal, Cardinal Concepts
Michel Cheff, Canadian Museum of Civilization
Audrey Churgin, CARFAC
Patrick Close, CARFAC Saskatchewan; CCA Board
François Colbert, École des Hautes Études Commerciales
E. Jane Condon, Department of Canadian Heritage
Mela Constantinidi, The Ottawa Art Gallery
Shelley Crawford, Visual & Performing Arts, Arts Management, University of Toronto,
Scarborough Campus; Chair, Canadian Association of Arts Administration Educators
Alexander Crawley, Canadian Independent Film Caucus
Kathleen Darby, Winnipeg International Writers Festival
Alain Dancyger, Les Grands Ballets Canadiens de Montréal
Rick Darroch, Canadian Museums Association
Joy Davis, Cultural Resource Management, University of Victoria
John Dennison, Department of Canadian Heritage
Murray Dineen, Department of Music, University of Ottawa
Hamal Docter, Canadian Dance Assembly
Jerry Doiron, Shaw Festival; Chair, Professional Association of Canadian Theatres
Daniel Donaldson, Living Arts Centre
Bruce Duggan, formerly Winnipeg Symphony Orchestra
Francis Fagan, Association of Cultural Industries of Newfoundland and Labrador
Tamara Feick, Department of Canadian Heritage

Peter Feldman, CAPACOA
 Sharon Fernandez, Canada Council for the Arts
 Julie Fossitt, National Arts Centre
 Mireille Gagné, Centre de musique canadienne au Québec
 Brenda Gainer, MBA Program in Arts and Media Administration, Schulich School of Business,
 York University
 Jim Garrard, Toronto Arts Council
 Jane Gardner, Theatre Ontario
 Peter Gardner, Newfoundland Symphony Orchestra; CCA Board
 Dennis Garreck, SaskCulture Inc.
 Kim Gaynor, L'Opéra de Montréal
 Raymonde Gazaille, Conseil québécois du théâtre
 Margaret Genovese, Genovese Vanderhoof & Associates; Income Managers Program
 Dianne Gibbs, Shaw Festival
 Mallory Gilbert, Tarragon Theatre
 Jennifer Ginder, Consultant
 Rose Ginther, Arts and Cultural Management, Performing, Visual and Communication Arts
 Division, Grant MacEwan College
 Elizabeth Goger, Canadian Museum of Civilization
 Patricia Gratton, Art Gallery of Newfoundland and Labrador
 Carol Greeyes, Saskatchewan Arts Board; Co-Chair, Cultural Sector Study Update
 Sandra Grismer, Saskatchewan Cultural Human Resources Council; Saskatchewan Craft
 Council
 Leah Hamilton, Genesis Consulting
 Sherri Helwig, S.L. Helwig and Associates
 John Hobday, The Samuel and Saidye Bronfman Family Foundation
 Glenn Hodgins, Ontario Arts Council
 Claire Hopkinson, Tapestry Music; Chair, Opera.ca
 Richard Hornsby, New Brunswick Arts Board; University of New Brunswick; Chair, CHRC Board
 Robert Hunter, Department of Canadian Heritage
 Selene Hurr, Netgain Partners Inc.
 Colin Jackson, Epcor Centre for the Performing Arts
 Howard Jang, Arts Club Theatre Company
 Rachel Johnson, student, Centre for Cultural Management, University of Waterloo
 Robert D. Johnston, Cultural Careers Council of Ontario
 Laurie Jones, National Film Board of Canada
 Tim Jones, Toronto Artspace; Canada Council Theatre Flying Squad
 Patricia Joyce, Canadian Actors' Equity Association
 Kay Kanbayashi, Canadian Music Centre
 Cherry Karpyschin, Prairie Theatre Exchange
 Keith Kelly, Canada Council for the Arts
 Russell Kelley, Canada Council for the Arts
 Nadia Laham, Department of Canadian Heritage
 Marie Lalonde, Ontario Museum Association; CHRC Board
 Ron Lamoureux, Centre éducatif, Collège universitaire de St-Boniface; CHRC Board
 Julie-Anne Leclerc, Orchestre Symphonique de Montréal
 Steve Lescault, Quebec Drama Federation
 Sylvia Jonescu Lisitza, Moving Images Distribution
 Ottie Lockey, Ottie Lockey Management
 Catherine Longfield, Ontario Ministry of Culture
 Lucienne Losier, Office of Senator Viola Léger
 Hubert Lussier, Department of Canadian Heritage
 Laura MacKay, Centre for Art Tapes
 Elizabeth MacKinnon, Department of Canadian Heritage

John Mahon, Edmonton Arts Council
Jane Marsland, Jane Marsland Consulting
Maria Martin, Department of Canadian Heritage
John McAvity, Canadian Museums Association
Tom McCabe, Theatre Calgary
Claire McCaughey, Canada Council for the Arts
Terresa McIntosh, Portrait Gallery of Canada
Micheline McKay, Opera. Ca (Professional Opera Companies of Canada)
Mark Melymick, ACTRA; CHRC Board
Jack Mills, Calgary Philharmonic Orchestra
Shadi Mogadime, Shaw Festival
Julia Mordini, student, Centre for Cultural Management, University of Waterloo
Rosalyn Morrison, Ontario Crafts Council; Canadian Crafts Federation
Joanne Morrow, The Banff Centre
Jane Needles, Consultant
Pascal Normandin, Musée des Beaux-Arts de Montréal
Mern O'Brien, Department of Canadian Heritage
Catherine O'Grady, Ottawa International Jazz Festival; Festival 4-15: Ottawa Festival of the Arts
for Young Audiences
Rosie Patch, CAPACOA
Graeme Page, Netgain Partners Inc.
Marion Paquet, M.A.P. Consulting Services Inc.
Anne Patterson, Danny Grossman Dance Company; Chair, Canadian Association of
Professional Dance Organizations
Paulette Pelletier-Kelly, CultureWorks
Judi Piggott, Alliance for Arts and Culture
David Poole, Canada Council for the Arts
William D. Poole, Centre for Cultural Management, University of Waterloo
Bruce Porter, Association of Cultural Industries of Newfoundland and Labrador; CHRC Board
Pauline Rafferty, Royal British Columbia Museum
Donna Ratchford, Ontario Ministry of Culture
Douglas Riske, Manitoba Arts Council
Dawn Roach, Canadian Museums Association
Gie Roberts, Alberta Theatre Projects
Ronald Rompkey, Memorial University; Writers Union of Canada; CHRC Board
Malka Rosenberg, Ontario Ministry of Culture
Denise Roy, Performing, Visual and Communication Arts Division, Grant MacEwan College;
Chair, CCA Board
Peter Sandmark, Independent Film and Video Alliance
Trudy Schroeder, The Winnipeg Folk Festival; CCA Board
Francine Schutzman, Organization of Canadian Symphony Musicians
Raymond Sealey, Canadian Amateur Musicians
Ana Serrano, Canadian Film Centre; CCA Board
Kathryn Shailer-Hanson, Continuing Education, University of Winnipeg
Amela Simic, Playwrights Union of Canada
Robert Sirman, National Ballet School
Judy Slivinski, Consultant
Catherine Smalley, George Cedric Metalf Charitable Foundation
Gerald S. Smith, Arts Administration and Cultural Management, Humber School of Performing
Arts, Humber College
Jenn Soutter, Multicultural Arts for Schools and Communities
Robert Spickler, Centre canadien d'architecture
Victoria Stasiuk, student, University of Western Ontario
Victoria Steele, National Arts Centre

Susan Stevenson, Periodical Writers Association of Canada
Kate Tansley, Shaw Festival
Barbara Terfloth, Canadian Artists Representation Copyright Collective Inc; CHRC Board
Peter Thomas, Jugglers Cove Fine Arts and Crafts; CHRC Board
Anne Thompson, Department of Canadian Heritage
Kate Thomson, student, Centre for Cultural Management, University of Waterloo
Sophia Trottier, National Arts Centre
Andrea Vagianos, Dancemakers
Anne Valois, Canada Council for the Arts
Julie Vanderyagt, Arts and Entertainment Management Program, Capilano College
Karen Virag, Editors' Association of Canada; CHRC Board
Lucille Wagner, Consultant, LJW Corp.
Craig Walls, Manitoba Culture, Heritage and Tourism
John Watson, Theatre Ontario
Terry Welsh, Manitoba Culture, Heritage and Tourism
Frances Westley, McGill McConnell Program for National Voluntary Sector Leaders, McGill
University
Cynthia White-Thornley, Department of Canadian Heritage
Lucy White, Professional Association of Canadian Theatres
Elisabeth Whitlock, Orchestras Canada
Meghan Wiggin, student, Centre for Cultural Management, University of Waterloo
Valerie Wilder, National Ballet of Canada
Megan Williams, Canadian Conference of the Arts
Joyce Zemans, MBA Program in Arts and Media Administration, Schulich School of Business,
York University

ENDNOTES

- 1 Canadian Museums Association, *Muse*, September/October 2001, p. 25.
- 2 *Leadership Development and Renewal: A Learning Strategy for Senior Performing Arts Managers*, by Tom Lewis, Greg Baeker and Jane Marsland, with support from Cultural Careers Council Ontario, September 2000, p. 16, p. 21.
- 3 Over the course of phase 1, some 170 people were consulted individually or in groups. They included a wide variety of managers, administrators and directors (senior, mid-career, and young entrants) from different disciplines and regions and organizations of various sizes, and students preparing for management careers in the sector, representatives of national arts and cultural service organizations, public sector and foundation funders, particularly those involved in capacity-building, organizational development, technical assistance, mentoring and professional development programs, educators in formal education programs for cultural management, representatives of cultural human resource councils and networks, federal and provincial, mentors and consultants to cultural organizations, and other organizational development, technical assistance and human resource specialists. The names of those consulted are listed in Annex B.
- 4 *Cultural Human Resources Sector Study -- Update: Terms of Reference*, July 2001, p. 13.
- 5 The Association of Cultural Executives makes an award each year to one of its members for professional achievement, but the award has little public profile and limited national reach. The CCA administers the Keith Kelly Award for Cultural Leadership, but it is given for "a significant contribution to the arts through advocacy, public discourse or leadership" and does not specifically address arts or museum management.
- 6 *Leadership Development and Renewal*, pp. 4-5.
- 7 Canadian Museums Association, *National Compensation Survey 2000/2001*, by Deloitte & Touche, 2001, p. 9.
- 8 The surveys and studies referred to are: the CMA, *National Compensation Survey 2000/2001*; the Canadian Art Museum Directors Organization, *1997 CAMDO Salary Survey*, by Jann L. M. Bailey; the Professional Association of Canadian Theatres, *Human Resources in the Canadian Theatre: A Guide to Hiring, Contracts, Positions, Compensation, Benefits and Policies*, November 1997; Conseil des arts et des lettres du Québec, *Portrait économique: Les organismes de production en arts de la scène et les centres d'artistes en arts visuels et en arts médiatiques subventionnés par le Conseil des arts et des lettres du Québec de 1994-1995 à 1997-1998*, October 2000; Genesis Consulting, *Human Resources Issues in Nova Scotia's Performing Arts: A study of personnel issues facing not-for-profit arts organizations*, August 2001; Opera America, *Human Resources Survey Report 2000*; and Orchestras Canada, *Comparative Report 1999-2000*.
- 9 Allen Grossman, *Reassessment of Support for Arts Organization Resources*, National Endowment for the Arts, November 2000, pp. 31-32.
- 10 Warren Dow, *Trends in the Workforce and Workplace*, prepared for the Human Resources Committee of the Capacity Joint Table, Voluntary Sector Initiative, Fall 2001, p. 34.
- 11 Michael Valpy, *The Globe and Mail*, Feb. 9, 2002, p. F7.
- 12 Examples include Douglas Booker, Kathy Malizia, Leah Ben-Porat, Deborah Yin, and Andrea Chatterton, *Recruiting the Next Wave: A Survey of Student Employee Opinion in the Federal Public Service Final Report*, May 2001; Jennifer L. Smith and Susan Snider, *Facing the Challenge: Recruiting the Next Generation of University Graduates to the Public Service*, by the Public Policy Forum for the Public Service Commission of Canada, 1998; Canadian Policy Research Networks/CKOS, *What is a Good Job? Changing Employment Relationships Survey, 2001*.

- ¹³ CMA, *National Compensation Survey*, p. 8.
- ¹⁴ *Professional Development for Performing Arts Managers in Canada: A Needs Assessment*, by Janis A. Barlow, Rebecca Cann and Catherine Smalley, for PACT, POCC and Orchestras Canada, with support from Cultural Careers Council Ontario and HRDC, August 2000, p. 14.
- ¹⁵ Conseil québécois des ressources humaines en culture, *Guide d'évaluation des besoins et de gestion de la formation continue: Document de travail*, October 2001. CQRHC has also published other documents related to managing in the cultural sector, including *La gestion d'une corporation sans but lucratif dans le secteur culturel au Québec*, 2001; *L'exercice de la profession dirigeante ou dirigeant d'association*, 1999; and *Compétences de management*, 2000.
- ¹⁶ Eric Wilner, WME Consulting Associates, *The Human Resources Management Function in the Cultural Sector*, for the Cultural Human Resources Council, January 2001, pp. 15-16.