

Creative Management in the Arts and Heritage:  
Sustaining and Renewing Professional Management  
For the 21<sup>st</sup> Century

A Proposed Action Plan for  
Creating Winning Conditions

A project of the Canadian Conference of the Arts  
In collaboration with the Cultural Human Resources Council  
With the financial support of  
The Samuel and Saidye Bronfman Family Foundation

Prepared for the 2003 Chalmers Conference of  
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<b>In providing operating grants to not-for-profit cultural organizations, Canada's public sector funding bodies should make the development of healthy and humane human resource policies and practices an important criterion in grant decisions.</b>	
<b>Recommendation 2:</b>	<b>28</b>
<b>Led by the Cultural Human Resources Council, with financial support from Human Resources Development Canada, sector organizations should work together to develop and share human resource policies, tools, templates, and best practices. This should include developing an inventory of HR tools and resources appropriate to the sector, identifying the additional tools</b>	

that need to be designed and developed, and undertaking the work of creating and distributing these resources.

**Recommendation 3: 31**  
Among the tools proposed in Recommendation 2, information and training on the roles and responsibilities of boards, board recruitment and development, and sound governance policies and practices should be a priority for early development.

**Recommendation 4: 31**  
To design the implementation of Recommendations 1-3 and ensure their financing, the relevant government agencies and departments should form working groups to obtain the funds required for the development of human capital tools and increased funding for not-for-profit cultural organizations.

At the federal level, this group includes the Department of Canadian Heritage, Human Resources Development Canada, the Canada Council for the Arts, the Cultural Human Resources Council, and the Canadian Conference of the Arts.

At the provincial level, the relevant authorities are likely to include the arts council, the ministry responsible for culture, the ministry responsible for labour market and human resource development and, where applicable, the sectoral council for culture.

**Recommendation 5: 32**  
To accelerate consideration and implementation of Recommendations 1-4, a discussion of the Creative Management action plan, the Face of the Future report, and the national compensation study of the Cultural Human Resource Council should be scheduled for the next meeting of the national funders' group (the Canada Council for the Arts and the provincial/territorial councils and departments) and the next meeting of the federal, provincial and territorial deputy ministers of culture.

**Recommendation 6: 32**  
Interested foundations and public sector funding bodies should support pilot projects in "cluster" management

**organizations which provide administrative services to cultural organizations and encourage them to include human resource services.**

**Recommendation 7: 33**

**The Canadian Association of Arts Administration Educators (CAAAE) should undertake its intended survey of arts administration/cultural management graduates to gather information on employment status and barriers, and reasons for staying in or leaving the cultural sector, and disseminate the results to funders, service organizations and practitioners.**

**Recommendation 8: 33**

**As the organizer of the annual Chalmers conferences for arts service organizations and of the Creative Management project, the Canadian Conference of the Arts should host a meeting of educators and executive directors of service organizations to discuss ways in which the educators and sector practitioners can work together more closely and effectively.**

**Recommendation 9: 33**

**Arts and cultural management educators, the Cultural Human Resources Council and the provincial sectoral councils, working with service organizations representing practitioners, should undertake an examination of the knowledge, competencies, and expertise cultural managers need now and in the foreseeable future; determine if there are gaps and needs in educational provision and on-the-job training that should be filled; and make recommendations to the appropriate authorities and the sector.**

**Recommendation 10: 34**

**To provide professional development, skills development, and peer networking opportunities for cultural managers at all career levels, public sector funders should offer focused, systematic and more substantial support to municipal, provincial and national service organizations which furnish these services.**

- Recommendation 11:** 37  
To attract and develop new cultural managers, current internship programs should be maintained and improvements pursued to facilitate mentored workplace-based career development internship opportunities.
- Recommendation 12:** 38  
Public sector funders which give operating grants to not-for-profit cultural organizations should provide opportunities for sabbatical leaves for senior managers and mentored career advancement for mid-career managers.
- Recommendation 13:** 39  
The Canada Council for the Arts and the Department of Canadian Heritage should organize a meeting which brings together federal, provincial and foundation funders of capacity-building, stabilization, and organizational development programs to share information, improve coordination, build a bank of best practices, and discuss related issues.
- Recommendation 14:** 39  
The Department of Canadian Heritage and the Canada Council should undertake a study of existing mentors in the Canadian cultural sector, determine the need to train additional mentors, and develop means for doing so. The study should be undertaken in consultation with capacity-building, stabilization and organizational development programs and universities, colleges and specialized training institutions.
- Recommendation 15:** 40  
As recommended by Face of the Future, the Cultural Human Resources Council should develop and lead a national human resources strategy for the cultural sector, taking into account the recommendations in this plan, promote professional HR policies and practices for cultural managers across the sector, and promote cultural management as a viable career choice among students, educators, and cultural workers.

<b>Recommendation 16:</b>	<b>41</b>
<b>As Human Resources Development Canada devolves responsibility for labour market development to the provinces, the provincial authorities working with the sector should develop sectoral councils in culture and ensure that they are adequately funded and supported.</b>	
<b>Recommendation 17:</b>	<b>41</b>
<b>As follow-up actions to this study and to increase awareness of the importance of management development and retention, CHRC should disseminate the findings from its national compensation study widely and service organizations should encourage their members to bring the compensation study and the Creative Management action plan to the attention of managers, staff and boards.</b>	
<b>Recommendation 18:</b>	<b>41</b>
<b>Working in partnership with the CHRC and service organizations, the Canadian Conference of the Arts should continue its involvement in cultural management issues, bringing together the various stakeholders to implement this action plan and continuing to be a member of the Advisory Committee to the project on Developing Human Resources in the Voluntary Sector.</b>	
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## **INTRODUCTION**

In spring 2002, the Samuel and Saidye Bronfman Family Foundation (SSBFF) approached the Canadian Conference of the Arts (CCA) about participating in an action-oriented research and consultation project called Creative Management. The purpose of the project was to identify the challenges facing professional management personnel in Canada's not-for-profit arts and heritage organizations and develop practical recommendations to meet these challenges.

In view of the importance of this topic, the CCA was pleased to collaborate on the project and engaged arts consultant Jocelyn Harvey as the coordinator. The project has been financially supported by the SSBFF, with additional funding for the research component from the Department of Canadian Heritage, and carried out in close consultation with the Cultural Human Resources Council (CHRC). It has focused on both the present and the future – our experienced managers now in the workforce and their need for professional renewal and reinvigoration, and the development of conditions that will attract “successor” generations eager to work as managers in Canadian cultural organizations.

### **Background**

The pioneer generation of Canadian cultural managers will begin reaching retirement age within the next decade, and some have already left the sector for less stressful and better compensated jobs elsewhere. Coming along behind this generation is a smaller cohort of Canadians, one which is highly educated, technologically savvy, and culturally diverse, but burdened by record-high student debt loads and likely to have its pick of jobs.

As the boomers prepare to retire, there is a growing sense of urgency across all sectors of the Canadian economy about the impending shortage of workers and intense competition for professionals in the decades ahead. The bibliography at the end of this report shows that this concern is shared by governments, corporations, and the not-for-profit sector.

In a recent analysis of 2001 Census information, Statistics Canada noted that “an aging workforce is not unique to Canada” but “what distinguishes Canada is the relatively large size of the baby boom generation and, therefore, the potential rapid exit of these aging boomers from the labour market.”<sup>1</sup>

In view of this important generational shift, organizations like the Conference Board of Canada, the Public Service Commission of Canada, Human Resources Development Canada, the Canadian Federation of Independent Business, the Canadian Policy Research Networks, the Association of Universities and Colleges of Canada, the Voluntary Sector Forum, and a host of Canadian corporations have undertaken studies on human resource development, leadership succession and means of attracting and retaining a new generation of workers. Many sectors are intensifying their efforts to

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<sup>1</sup> Statistics Canada, “The changing profile of Canada's labour force,” 2001 Census ([www.statcan.ca](http://www.statcan.ca)), p. 4.

recruit young employees by providing improved compensation and other benefits and incentives. A number of recent studies have addressed these issues as they affect the Canadian cultural sector.<sup>2</sup>

Linda Duxbury, Director of Research at the Centre for Research and Education on Women and Work and the co-author of a new study on work-life balance, has noted a striking change in attitude among Canadian employers:

“I would say it’s only within the last two years that a lot of organizations have become serious about this. They’ve only become serious because we’re moving into a sellers market. They now see the writing on the wall with respect to demographics. In the best-case scenario, we’re only going to have enough workers to replace half the baby boomers who are retiring. We’re facing a skilled labour shortage. All of a sudden employers are recognizing that it’s not just good enough any more to talk about being *best practice*, you actually have to be *best practice*.”<sup>3</sup>

These generational changes come at a time when critical weaknesses are already apparent in the cultural community:

- Over the last 5-10 years we have lost a number of our senior managers, especially in the arts. Some have accepted prominent positions in arts organizations in other countries; some have left arts organizations to work as

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<sup>2</sup> Important cultural studies include Alberta Cultural Human Resources Steering Committee, Culture Steps Forward, Banff, 2001; Mercadex International Inc., Face of the Future, A Study of Human Resource Issues in Canada’s Cultural Sector: Findings and Recommendations, presented to CHRC, December 2002; Arts Leadership Network: Pilot Phase Evaluation and Next Steps, for Opera.ca, Orchestras Canada, and the Professional Association of Canadian Theatres, Sept. 2002; Association of Cultural Executives, “Human Resource Development in the Cultural Sector,” ed. Graeme Page, Management Matters, Fall 2002; Janis A. Barlow, Rebecca Cann, and Catherine Smalley, Professional Development for Performing Arts Managers in Canada: A Needs Assessment, for the Professional Association of Canadian Theatres and Theatre Ontario, August 2000; CAPACOA, Building Capacity for Performing Arts Distribution in Canada: New Service Initiatives for the Presenting Field, Sept. 2001; Conseil québécois des ressources humaines en culture, Compétences de Management, 2001; Diriger une association dans le secteur culturel: une affaire de compétence et d’engagement, Jan. 2000; L’Exercice de la profession Dirigeante ou Dirigeant d’Association, Dec. 1999 ([www.cqrhc.com](http://www.cqrhc.com)); Cultural Careers Council Ontario, Report on Consultations about Human Resources Needs in the Cultural Sector, 2002 and Strategic Skills Shortages in Ontario’s Cultural Sector, 1998 ([www.workinculture.org](http://www.workinculture.org)); Joy Davis, Bridging Gaps between Intention and Reality: Challenges Associated with Educational Participation, ICOM Study Series 2002, Aug. 2001; Genesis Consulting, Human Resource Issues in Nova Scotia’s Performing Arts, Aug. 2001; Tom Lewis, Greg Baeker and Jane Marsland, Leadership Development and Renewal: A Learning Strategy for Senior Performing Arts Managers, for PACT, Orchestras Canada, and Opera.ca, Sept. 2000; PACT, Human Resources in the Canadian Theatre, 1997 (new issue forthcoming); SaskCulture Inc., Handbook for Member Organizations: A resource providing human resources information and skill development, Dec. 2001; WME Consulting, A WME Consulting Associates Report to the Cultural Human Resources Council, The Human Resources Management Function in the Cultural Sector, Jan. 2001; Canadian Museums Association, National Compensation Study, 2000-1.

<sup>3</sup> Linda Duxbury, in an interview on work-life balance in Canadian workplaces, on the website of Human Resources Development Canada (<http://labour.hrdc-drhc.gc.ca>).



consultants and mentors; some were hired away by larger, better-paying not-for-profit organizations such as hospitals and universities or by the private sector, and some have departed involuntarily as the result of organizational crises and disagreements with their boards.

- Over the last decade, one of the ways in which many cultural organizations dealt with reductions in government funding was by eliminating the jobs that were “stepping stones” to senior management (the “2IC” or assistant manager positions), leaving the sector without great depth of experience at this level.

While concern about future workers has seized our attention, an equally important problem is that many experienced managers are working in extremely difficult and challenging conditions, often with inadequate resources.

In a letter about the Creative Management project, a leading Canadian philanthropist with long experience as a volunteer in both large and small arts organizations, wrote to say:

“There is no question that we expect an extraordinary amount from our Executive Directors. Thirty years ago their job was to manage an organization. Now they have to be fundraisers extraordinaire, out every night schmoozing with potential sponsors and donors, government lobbyists, meeting and stroking civic, provincial and federal government funders, labour specialists, negotiating extraordinarily difficult contracts with well-organized unions, capital campaign experts, operations and facilities mavens, not to mention full-time meeting attenders for the dozens of committees of the Board. And, they have to do this for half or a quarter of the sum that would be paid to someone in the private sector world, with half or a quarter of the staff!

It’s all quite depressing when you think about it and really amazing that anyone survives.”

Thus, as one former manager now working as a consultant to arts organizations told us, a vital concern is “keeping the current senior managers in the arts and allowing them to continuously upgrade their skills. Unless the retention crisis is dealt with, we will not be much farther ahead by training new recruits.”

## **Brief History of the Project**

The Creative Management project began with a roundtable meeting which brought together 25 Canadians involved in arts and museum management to define the issues to be explored in the ensuing research and consultations. The roundtable was followed by a literature search on cultural management issues and a review of current research on the Canadian labour force, the impact of generational change, and the expectations of new entrants to the workforce.

Extensive individual and group consultations were then undertaken with managers (experienced and emerging), artists, board members, service organizations, cultural

management educators, arts administration students, cultural sector councils, funding bodies and others involved in the cultural sector. Over this period of the project, more than 200 Canadians were consulted in groups and focused one-on-one interviews.

Based on these investigations, a discussion paper outlining the challenges and needs was prepared for the 2002 Chalmers Conference, an annual meeting of arts service organizations convened by the CCA. The conference, entitled *Creative Management, Creative Solutions*, provided a national forum for exploration of the issues. In addition to service organizations, the participants included the boards and staff of the CHRC and the CCA, cultural managers, cultural management educators, provincial sectoral councils/networks, and representatives of government departments and arts councils.

The Chalmers conference strongly endorsed the timeliness and relevance of the project. Participants stressed the importance of improving conditions for cultural management personnel through an integrated approach and called for action by all key stakeholders.

In late summer 2002, a report outlining the major findings and potential solutions was widely circulated (the Final Report on Phase 1) and posted on the website of the CCA, and comments and responses were invited.<sup>4</sup>

This current report – the proposed action plan to address the challenges and needs for both existing and future managers - builds on the large number of thoughtful and informed responses the CCA received about the Phase 1 report, as well as last year's Chalmers conference and consultations throughout the project.

Based on comments from respondents to the Phase 1 report, two additional issues are addressed in this action plan.

- The importance of positive and effective relationships between cultural managers and their boards - and, in the current environment, the problematic and difficult nature of too many of these relationships.
- The recognition that, while this project is focused on not-for-profit organizations, leadership succession is of great concern among book publishers.

## **The International Dimensions**

Throughout the industrialized world, cultural communities are facing problems similar to Canada's: an imminent leadership crisis brought on by demographics, increasingly difficult on-the-job challenges for cultural managers, new competency demands, and shifting work and life expectations among the smaller generation of young people who will be entering the workforce.

In many countries, cultural sector organizations, government funding bodies, and foundations have launched new initiatives to address these changes. Specific initiatives

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<sup>4</sup> Canadian Conference of the Arts, *Creative Management in the Arts and Heritage: Sustaining and Renewing Professional Management for the 21<sup>st</sup> Century: the Final Report of Phase 1*, July 2002 ([www.ccarts.ca](http://www.ccarts.ca)).

will be described in the relevant sections of the action plan below, but three quotations will indicate the range and depth of concern apparent on the international scene.

In a major study called Succession: Arts Leadership for the 21<sup>st</sup> Century, the Illinois Arts Alliance Foundation remarked:

“The nonprofit arts have thrived in the past three decades largely because a generation of arts workers accepted low wages for the nonpecuniary rewards of working in the arts. This discounted labor has been cited as a crucial source of capital for the nonprofit arts sector. It may be that this crucial source of support is now being threatened by recent economic and cultural changes affecting all non-profit arts workers. Often facing a high urban cost of living and heavy student loan debt, potential nonprofit arts workers entered a booming new economy in which for-profit corporations offered high salaries and encouraged creativity and nonconformity in ways that used to be more unique to the arts world.

Compounding these problems is the growing complexity of work in nonprofit arts organizations today. These organizations have to please a wider set of constituencies, scramble for more competitive grants and donations, answer to more funders’ expanding sense of accountability, keep up with technological change, and compete with commercial culture for audiences. It seems reasonable that the more demanding and professionalized nonprofit work environments become, the less potential employees have to accept lower nonprofit salaries....

Besides a possibly dwindling labor pool of committed and qualified new workers, these sorts of stresses fuel concerns about midcareer attrition. Inside observers claim that high stress and low salaries are leading to significant attrition, and the midcareer burnout problem will only get bigger as the labor squeeze progresses. Low salaries lead to an economic squeeze, as 30- or 40-something arts professionals who want to start a family or purchase their own home decide to seek better-paying jobs in the private sector.

Similar pressures may also be forcing the top leadership out, as executive directors – driven by burnout and/or the need for preretirement financial security – leave nonprofit arts organizations to seek out better paying jobs. Organizations without stable leadership suffer dramatic reductions in effectiveness, compounding the troubles of the staff. **The overall view is of a sector struggling to attract qualified new workers, ill-equipped to retain middle managers or executive directors, and unable to replace outgoing executive directors.”**<sup>5</sup>

Introducing its new corporate plan, the Arts Council of Ireland described the Irish arts community in these words:

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<sup>5</sup> Illinois Arts Alliance Foundation, Succession: Arts Leadership for the 21<sup>st</sup> Century: Research and recommendations on leadership succession in nonprofit arts organizations, with the support of The Chicago Community Trust, 2003, p. A10 (our emphasis) ([www.artsalliance.org](http://www.artsalliance.org)).

“As a direct result of increased State support over the past decade, the arts in Ireland have been transformed.... The critical issue now is how best to build on this progress.... The seedlings of growth nourished over the last decade need to be planted on in more fertile ground.

Looking at the arts in Ireland today, we see low living standards, with many artists and companies too often battling against the odds. There is little or no investment in audience development. Organisationally, we see skills shortages and under-resourced managers and artistic directors. The transition from emergent young company to stable maturity defeats too many. The contributions of remarkable individuals are too often dissipated where no provision has been made for succession planning at management or board levels.”<sup>6</sup>

In the United Kingdom, a major inquiry has been conducted by the Clore Duffield Foundation in partnership with the Arts Council of England and Resource, the major organization serving museums.<sup>7</sup> Entitled the Cultural Leadership Initiative, the study has addressed three questions:

- “How can the foundation help the cultural sector to develop a larger pool of potential leaders – a cadre from which the leaders of tomorrow will emerge?”
- How can present and future leaders best develop their potential?
- How can the chances of success of existing leaders be improved?”

Among the major findings of this inquiry were the following:

- a widespread concern in the arts and museum fields about management development, both current and future;
- barriers to developing and attracting managers, including lack of time and money for development and training, poor pay and benefits, and the ad hoc nature of career progression;
- the need for long-term investment (“many previous forays into arts leadership development seem to have done good work, but then disappeared because of funding problems”);
- The need for broad-based coordinated action (“leadership appears to be a preoccupation for many different organisations across the cultural sector. What has emerged is a picture of general concern, with some practical initiatives being implemented in certain places, but nothing happening across the sector as a whole”; “the problem of leadership...needs tackling at every level in the system, from entry onwards”); and
- The need for a flexible suite of programs or program components offering leadership development, mentoring, secondments, grants to attend development and training courses, and support for the beneficiary’s organization so that she or he can spend a period of time away in professional development.

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<sup>6</sup> Arts Council of Ireland, Arts Plan for 2002-2006 ([www.artscouncil.ie](http://www.artscouncil.ie)).

<sup>7</sup> Clore Duffield Foundation, Cultural Leadership: The Clore Leadership Programme Task Force Final Report, December 2002. ([www.cloreduffield.org](http://www.cloreduffield.org)).

## Organization of This Report

This plan has been prepared for discussion at the 2003 Chalmers Conference, to be held May 21-22 in Ottawa. For readers unfamiliar with the previous Phase 1 report, it begins with a summary of the challenges and needs established in the course of the consultations and research. It then proposes a detailed action plan to improve conditions for management personnel, with specific recommendations made to various stakeholders.

This report also draws on an excellent document prepared for the Cultural Human Resources Council by Mercadex International Inc., which CHRC has been using as the basis for regional roundtable discussions across Canada in recent months. Entitled Face of the Future: A Study of Human Resource Issues in Canada's Cultural Sector: Findings and Recommendations, the Mercadex report has a broader focus than the Creative Management project, dealing with conditions that affect all creators, performers and cultural workers in the sector, but it comes to many of the same conclusions.<sup>8</sup>

One of its seven major recommendations is to “**Support the continued recruitment, development, retention and succession of cultural management**”:

“This objective addresses the growing crisis within management of cultural organizations and enterprises, particularly non-profit, arising from the devaluation of cultural managers, stressful working conditions, low pay, inadequate professional development and professional renewal opportunities, challenges with governance, and the lack of succession planning.”<sup>9</sup>

Annex A, a selected bibliography of materials consulted during the Creative Management project, concludes the report.

## Premises of This Report

A recent issue of The Arts Advocate contains a round-up of “Human Resource Initiatives in the Cultural Sector” which lists many initiatives, studies, and surveys now under way. The article points out that “Human resources issues and management in the cultural sector are garnering attention like never before” and “the initiatives represent a revolution of sorts, the industry coming together as a whole, to build Canada’s arts infrastructure of the future.”<sup>10</sup>

A similar point is made in Face of the Future:

“The defining feature of the current era is multiplicity. In the cultural sector, in human resource terms, multiplicity manifests itself as

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<sup>8</sup> Face of the Future, p. 2. The report also deals with issues related to employment status, recruitment and retention, access to training, and demand for new competencies, within the environmental context of new technologies, globalization, government policies and demographics.

<sup>9</sup> Face of the Future, p. 35.

<sup>10</sup> The Arts Advocate, Vol. IX, Issue 3, Feb. 19, 2003, pp. 5-6.

collaboration, participation, interdependence and synthesis. If the cultural sector incorporates a multiplicity of interrelated interests and activities, **it follows that no one initiative or stakeholder, by itself, will be able to adequately address the complex of human resource challenges currently facing the sector.**" <sup>11</sup>

This action plan is premised on the belief that **all stakeholders share the responsibility for improving conditions** and that only by working together in a coordinated manner will we achieve our goals. What is needed is not a "single-stakeholder-led" plan but **the coordination of multi-stakeholder endeavours consistently and energetically pursued through "collaboration, participation, interdependence and synthesis."**

A second premise in this action plan is a preference for integration over segregation. Where possible, the plan encourages the **integration of human resource and management development issues in ongoing operating grant programs**, rather than proposing another short-term project fund which will eventually disappear. The point is to stimulate cultural organizations **to internalize responsibility** for reasonable compensation, professional development, leadership succession, and sound governance, **making consideration of human capital part of their every day ongoing operations.**

In proposing to incorporate rather than separate human resource matters from consideration of the rest of an organization's life, this action plan shares the same underlying philosophy about the importance of **an integrated and holistic approach to arts organizations** that has been expressed in a number of recent works. <sup>12</sup>

This approach is aptly described in one of those studies ([Building Blocks: New Tools and Strategies for Funding Bricks and Mortar in the Cultural Arena: A Policy Makers' Forum](#)):

"In order to maintain and develop successful cultural facilities, we need to change the way we think about arts organizations and their facilities. We can no longer compartmentalize programs, operations and capital, ignore capital needs, and expect a thriving cultural sector to be the outcome.

A holistic approach is the key. Vibrant, welcoming and safe cultural facilities, which meet the needs of arts organizations and their audiences, are only possible in an environment where **all** the elements that comprise a healthy arts organization are understood and addressed. Working together, the arts community and its government and private sector funders need to evaluate and support the necessary balance between

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<sup>11</sup> [Face of the Future](#), p. 21 (our emphasis).

<sup>12</sup> Besides [Building Blocks](#) (see the next footnote), some examples include [Managing Our Performance Spaces](#), under the direction of Louise Poulin for the Canada Council in collaboration with the Department of Canadian Heritage, 2003; the [Arts4Change](#) project and the [Creative Trust](#) project in Ontario; Peter Brown, [Arts Working Capital Study](#), 2001; the [Arts in Transition](#) project of the Canadian Conference of the Arts, The Samuel and Saidye Bronfman Family Foundation, and the Department of Canadian Heritage, 1996-7; the Ontario Arts Council's [Forum for Arts Specialists and Mentors](#), Feb. 2003; and John Talbot & Associates, [Not-for-Profit Sustainability Project](#), 2002, undertaken for a consortium of British Columbia funders.

artistic mission and program, organizational capacity and operations, and capital structure.”<sup>13</sup>

To describe the approach taken in this action plan, we might adopt a phrase which the President of the Caledon Institute of Social Policy used to explain how his organization garnered support for action to reform the child benefits system in Canada – “relentless incrementalism”.

“Relentless incrementalism consists of strings of reforms, often seemingly small and discrete when made, that accumulate to become more than the sum of their parts. Relentless incrementalism is purposeful and patterned, not haphazard and unintended. The drip drip drip of individual changes over time carves substantial and planned shifts in the structure and objectives of public policy.”<sup>14</sup>

As a result, this action plan draws together a series of many reforms, existing and proposed, local, provincial and national, which are both purposeful and patterned. Some of the recommendations call for strengthening existing initiatives and programs, maximizing collaboration and partnerships among sector organizations and between sector organizations and government departments and agencies, and fortifying the ability of the sector to develop and deliver the tools needed. Other recommendations require striking out in new directions, with new initiatives and new resources. Some are easily “do-able”, others more difficult and long-term.

In an essay entitled “Some Thoughts About Succession”, Theodore S. Berger, the Executive Director of the New York Foundation for the Arts, remarked:

“I have always been proud to have grown up with this generation of [veteran] arts administrators and to have been part of the enormous accomplishments and extraordinary leadership that have strengthened the arts in this country for over thirty years. **I now realize that by postponing the needs of tomorrow, we have collectively delayed the appropriate and necessary continuity our individual organizations and our field as a whole require. We have not taken enough of the steps necessary for the roots of our achievements to grow and mature....**

Our ability to attract, maintain, and sustain professionals over the long term is an overall industry need that requires new ideas, collaborations, and certainly additional resources. It also requires the commitment of all of us in our field –veterans, midlevel and entering administrators, boards,

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<sup>13</sup> Building Blocks: New Tools and Strategies for Funding Bricks and Mortar in the Cultural Arena: A Policy Makers' Forum, report prepared by Janis A. Barlow & Associates, for the Association of Artist-Run Centres & Collectives of Ontario; Dance Umbrella of Ontario; Orchestras Canada; Professional Association of Canadian Theatres; Theatre Ontario; Toronto Artscape Inc., and Toronto Theatre Alliance, 2001, p. 4.

<sup>14</sup> Ken Battle, “The Role of a Think-Tank in Public Policy Development: Caledon and the National Child Benefit,” Horizons, Vol. 6, No. 1, p.12, published by the Policy Research Initiative.

fundes – to think about succession not only for ourselves as individuals or organizations but for our field as a whole.”<sup>15</sup>

It is the CCA’s hope that the plan below will be supported by all those stakeholders who are vital to its implementation since each needs to make an essential contribution.

These stakeholders include arts and cultural service organizations (municipal, provincial and national) which provide professional development and peer networking opportunities for cultural managers; federal, provincial and municipal arts councils and culture departments; federal and provincial ministries responsible for labour force and human resource development; the sectoral councils in culture; cultural management educators; and individual cultural organizations – their managers, boards, and artists.

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<sup>15</sup> Theodore S. Berger in Illinois Arts Alliance Foundation, Succession, p. C80 (our emphasis).



## **PROBLEMS AND ISSUES: THE CHALLENGES THAT NEED TO BE ADDRESSED**

Over the course of the Creative Management project, a number of major challenges have been identified. Except for the subject of the relationships between managers and arts boards and that of leadership succession in book publishing, these challenges were discussed in greater detail in the Final Report on Phase 1. With the two new additions, they are summarized here for ease of reference.

### **Structural and Attitudinal Realities**

The environment in which cultural managers work has undergone tremendous change in the last decade. These changes have made managing a cultural organization today very complex and demanding.

The environmental developments include:

- A greatly increased need to improve entrepreneurial skills and expertise and diversify revenues as government support in most parts of Canada has become less reliable, more tightly focused or more project-based;
- A flattening out and decline in private sector support and returns on endowment income in the economic slowdown of the last few years;
- Greatly increased competition for donations and sponsorships from sources like hospitals and universities;
- Changing demographic conditions, particularly the interests and expectations of an increasingly culturally diverse population;
- An increasing lack of leisure time, higher expectations for customer service standards, and a greatly expanded array of competing artistic events and home-based entertainment options;
- For some art forms, static or declining audiences;
- The decline in volunteering;
- Increased demands for accountability from government funders;
- Severe reductions in arts education programs in the schools; and
- Increased competition and opportunities from the growing globalization of cultural markets.

These environmental realities call for a host of specialized and sophisticated skills and make the job of the cultural manager challenging and complex. But, despite this, the profession is not particularly well-valued or well-understood, even among some board members and artists. The manager's role in providing organizational continuity and stability – and making possible the connection of the artist and the public - is often not recognized.

In Canada, there is no accreditation or certification process for cultural managers. While formal educational training (in college and university cultural management, museum management, arts administration and cultural industry-based programs) is more and

more common among new workers,<sup>16</sup> most of the senior managers now in the workforce came to the profession from other directions and largely learned on the job. There is still no one way into the profession and no clear path for career progression. As a result of all these factors, the job of the cultural manager and the knowledge and expertise required remain something of a mystery for many people.

In addition, managers are often their own worst enemies – acceding to unreasonable working conditions and pay and thereby appearing to accept the under-valuing of their profession. There is a growing awareness within the field that managers have to take responsibility for changing attitudes, beginning with their own.<sup>17</sup>

Over and above these explanations, however, is something even more fundamental: a tendency to “grow” the artistic program, often at the expense of the human infrastructure - to devote every extra dollar to the artistic product - and a corresponding feeling that spending on “administration” is somehow wasteful.

Because these views often reflect a passionate dedication to the arts, it is natural to regard them as selfless. But unchecked, they can be responsible for organizational cultures which are stretched perilously thin, fragile, unstable, undercapitalized and dependent on a steady turnover of “cheap labour.”

As arts consultant Adrian Ellis has suggested, the consequence is that many arts organizations

“are something of a disappointment for the well-intentioned, competent, highly motivated people they recruit. The impetus to programmatic growth – spurred both by the ever present gap between program and mission and by sheer entrepreneurial drive – tends to leave institutions increasingly hard-pressed, under-managed, under-staffed, ‘de-skilled,’ ill-housed, foreshortened in their horizons, and generally ground down.”<sup>18</sup>

Face of the Future called the prevailing attitude in the Canadian cultural sector a “culture of exploitation”:

“Compounded by a chronic shortage of resources over the past two decades, cultural organizations across the country have had weak human resource management practices, with an inadequate focus on human resource needs, policies, best practices, and requirements. This has manifested in a myriad of human resource problems in the sector, the most critical of which are poor wages and working conditions, a lack of commitment to professional development, failure to plan for succession, and tensions in the workplace on many levels. These human resource

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<sup>16</sup> The development of arts management training programs is described in Yves Evard and François Colbert’s article, “Arts Management: A New Discipline Entering the Millennium?”, in the International Journal of Arts Management, Vol. 2, No. 2, Winter 2000, pp. 4-13. They point out that the first period of development, “one of slow growth, lasted from 1966 to 1980, while a second, more rapid period of growth stretches from 1980 to the present.”

<sup>17</sup> This is particularly well-documented in the Barlow, Cann and Smalley and the Lewis, Baeker and Marsland studies.

<sup>18</sup> Adrian Ellis, The Platform ([www.aeaconsulting.com](http://www.aeaconsulting.com)).

conditions are sufficiently serious that many have described the prevailing attitude in the cultural sector as a 'culture of exploitation.' **Whether this culture is the cause or the result of the many human resource problems in the cultural sector, it clearly needs to change.** <sup>19</sup>

## **Compensation and Working Conditions**

There is a great deal of anecdotal information about compensation in the not-for-profit cultural sector in Canada which indicates that, with some exceptions (almost always in the larger-budget institutions), salaries are poor and benefits beyond the statutory are weak. Anecdotal information also suggests that in many cultural organizations, current rates of pay, burnout, stress and limited career development opportunities are inducing managers to leave the cultural workforce and making it difficult to replace them. One cause frequently cited for the chronic turnover in arts organizations is the very low pay, combined with inadequate benefits and long and sometimes unremunerated over-time work.

While compensation was repeatedly identified as a major issue in the consultations for this project, respondents noted the absence of up-to-date data on pay and benefits. The Cultural Human Resources Council took up this challenge and with funding from Human Resources Development Canada, the Department of Canadian Heritage, and the Samuel and Saidye Bronfman Family Foundation, it has been carrying out a national compensation study of management and administrative personnel in not-for-profit arts organizations across the country.

The compensation study was not yet finished at the time of writing this action plan, but it will be completed in late April, and CHRC will report on the findings during the May 2003 Chalmers conference. The study will give us up-to-date factual information on compensation and benefits and their impact on the attraction and retention of managers. It will also provide information on a number of other significant workplace issues such as staff turnover, training and development, the level of HR policy development, and the major human resource challenges facing arts organizations.

The national compensation study promises to be very useful for the development of public policy, funding criteria, and human resource tools that address the needs.

## **Attracting the Next Generation**

In a history of the nonprofit arts in the United States, John Kreidler has pointed out that

“The most elemental force in the massive growth of arts organizations in the early Ford [Foundation] years [the 1960s on] was the arrival of a large new generation of artists and other arts workers who were willing to support their work through discounted wages. The continuation of Ford era nonprofit organizations is, therefore, fundamentally tied to the ongoing availability of this core resource. For two reasons, the outlook is not good

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<sup>19</sup> Face of the Future, pp. 6-7.

for the sustainability of discounted labor: a significant portion of the veteran generation that founded the . . . organizations is departing, and it is not being adequately replaced by a new generation of discounted labor.”<sup>20</sup>

Over the last 30-40 years, the Canadian cultural sector has been equally blessed with an abundant supply of workers willing to accept sub-standard wages and working conditions. Indeed, the spectacular growth in the cultural labour force was fueled by the boomer generation. But with a smaller “replacement” generation ahead and intense competition for competent new workers, will they choose to work in the not-for-profit cultural sector?

A number of detailed research studies provide a clear picture of what young Canadians want from a job.<sup>21</sup> With slight variations, they show that young people are looking for 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. Of these expectations, only interesting work and possible opportunities to work in the field of study bode well for most cultural organizations.

In its Report on Consultations About Human Resources Needs in the Cultural Sector, the Cultural Careers Council Ontario reported that

“There is . . . an increasing disconnect between the attitudes and values of the different generations of culture workers. That is leading to differing and sometimes clashing expectations. The pioneer syndrome that motivated so many of those in the first eras of cultural activity is giving way in another generation that does not want to be heroic, but does expect better conditions, wages, pensions, etc. Motivation has to be re-defined for them.”<sup>22</sup>

The sector continues to attract young managers but retaining them as they grow older will be difficult unless we make significant improvements in compensation, working conditions, human resource practices, and work-life balance.

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<sup>20</sup> John Kreidler, The Nonprofit Arts in the Post-Ford Era: Part 3: Leverage Lost ([www.inmotionmagazine.com/lost3.html](http://www.inmotionmagazine.com/lost3.html)), pp. 2-4.

<sup>21</sup> Examples include Canadian Policy Research Networks/EKOS, What is a Good Job? Changing Employment Relationships Survey, 2001; 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.

<sup>22</sup> Cultural Careers Council Ontario, Report on Consultations About Human Resources Needs in the Cultural Sector, Dec. 2002, p. 8 ([www.workinculture.org](http://www.workinculture.org)).

## Developing a Diversified Workforce

In preparing future generations to administer and lead Canadian cultural organizations, it is important that the sector provide development opportunities for managers from the culturally diverse and Aboriginal communities, to enable them to work, as they individually choose, in culturally specific organizations, “mainstream” organizations, or both. Those consulted in this project frequently made this point and cited the following reasons:

- First, the sector workforce as a whole must become more representative of the culturally diverse population of Canada. This is particularly important in major urban areas, which have both large concentrations of professional cultural organizations and an increasingly diverse citizenry.
- Second, labour force growth in Canada is now deriving mainly from immigration. In an analysis of the 2001 Census, Statistics Canada noted that recent immigrants represent almost 70% of total labour force growth.<sup>23</sup>
- Third, the Aboriginal population of Canada is growing more quickly than the overall population and is considerably younger than the overall population. Thus, Aboriginal youth represent one of the only large cohorts in the next generation of workers.<sup>24</sup>
- Finally, cultural organizations within the culturally diverse and Aboriginal communities have typically had very lean administrations, little public funding, and a limited capacity to invest in developing their administrators and future leaders.

A number of initiatives are under way in government internship programs and arts councils at the federal and provincial level to strengthen the management capacities and provide training for culturally diverse and Aboriginal managers. These initiatives deserve to be supported. Developing a diversified management workforce for the future, for both culture-specific and mainstream organizations, is an important opportunity and responsibility for the sector and the funding bodies.

## On the Job Training and Professional Development

Cultural managers receive their training and professional development through formal management training programs offered by colleges, universities and other specialized institutions; apprenticeships, internships, and mentorships, most of which take place on the job; and short-term and long-term professional development opportunities, including

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<sup>23</sup> Statistics Canada, “The changing profile of Canada’s labour force,” 2001 Census, p. 6 (www.statcan.ca).

<sup>24</sup> Canadian Labour and Business Centre, Handbook: Skills and Skill Shortages, Trends in demographics, education and training, May 2002, p. 8.

those offered by arts and cultural service organizations at their annual conference or general meeting.

In relation to on the job training and professional development, those consulted in this project identified three particular problems: the limitations of many internship programs 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 cultural organizations and an extremely valuable means of introducing new workers to the realities of the workplace, but available programs are often not optimally structured for developing individual careers, being short-term and restricted by age and employment status.
- Mentorship is one of the preferred means of learning in the sector, but in comparison with the needs, we have a limited supply of experienced mentors and run the risk of burning them out through over-use.
- Three obstacles stand in the way of experienced managers taking advantage of opportunities for ongoing professional development and renewal:
  - time (most cultural organizations are so thinly resourced that the people, especially the senior managers, cannot take any prolonged time away from the job);
  - money (organizations have not developed “training cultures” and usually have budgeted little or no money for staff development); and
  - attitudes (professional development is simply not a high priority in the battle for resources to produce artistic work).

## **Professionalizing Human Resource Policies and Management**

One of the most arresting developments in the consultations for this project was a growing awareness in cultural organizations of the need to professionalize their human resource practices and an interest in finding means of doing so.

Except in government-operated institutions and a handful of other large organizations, most Canadian cultural organizations do not have access to trained professional advice in human resources, on staff or contract, and many lack formal documented human resource policies and procedures beyond the most rudimentary. As Face of the Future pointed out, the sector has not yet developed “an HR culture”.<sup>25</sup>

But managers are increasingly coming to realize that the complexity of issues related to HR has grown exponentially, and labour law and regulations now require specialized knowledge and expertise.

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<sup>25</sup> Face of the Future, p. 6.

Equally important are the higher standards expected by well-educated young workers, who want a humane and progressive HR environment. Emerging managers often confirm that they are looking for workplaces that embrace strong HR values, including clear job descriptions and contracts, performance evaluations and feedback, mentoring, opportunities for career development, and access to ongoing training.

Accessing HR expertise and developing a healthy and humane HR culture are no longer luxuries – they have become a necessity.

## **Relationships between Managers and Boards**

Reflecting on the “worrisome number of senior managers” who have recently parted company with their employers, an experienced former manager drew attention to the importance of the relationships between boards and managers. Because his views echo those of many we consulted in the arts and museum fields, his letter is quoted in some detail below:

“At the heart of the issue is that so many arts organizations do not have the ability to implement a basic practice for employment success that exists in most well-run businesses: good employers put conditions in place that attract and retain the best people.

Those conditions for success as I see them include:

- Quality of the employer. While there are certainly notable exceptions (including one I worked for recently), the quality of the employers (boards) that arts managers work for remains a significant problem.
- The organization’s ability to put resources in place that will make the job doable.
- The value placed on professional development and upgrading senior management skills, including the skills a manager requires to help make a board effective....

I see four issues in this area:

- Many well intentioned board members are untrained to do their jobs effectively.
- With the intense competition for good volunteers, there are simply not enough experienced volunteers to go around who can produce the required results.
- Board members have been bashed too often recently, leading to a reluctance to volunteer.

- Board effectiveness is closely related to the level of training and expertise that senior managers bring to their organizations.

Whether it is a shortage of bodies or a shortage of skills, a major priority needs to be to develop more effective board/management relationships because the simple fact is that many senior managers are tired of working for poor employers and too many board members are being turned off by a bad volunteering experience.”

Studies carried out in other countries have come to similar conclusions about the importance of the relationship between manager and board. The Clore Duffield Foundation in the UK, initiating its Cultural Leadership program, found that a “pressing problem facing leaders of charitable organisations is the management of their relationship with the chairman and board.”<sup>26</sup>

How important this relationship can be was emphasized by Bruce Atwater, an experienced member of cultural and corporate boards, in a discussion on “Leadership Development and Transition in the Arts”:

“good governance really determines whether you’re going to have effective long-term leadership or not. . . [and] poor governance is directly reflected in periodic leadership crises.”<sup>27</sup>

## Funders and Cultural Organizations

Boards of cultural organizations are strongly influenced by the signals that come from the public sector funding agencies, especially those that provide their major operating funds. The objectives of the funding programs, their criteria, and the weight given those criteria all carry messages to the board that “this is what the funder values.”

Participants at the 2002 Chalmers conference and many others consulted in the project recommended that, in their program objectives and criteria, funders providing operating assistance acknowledge the importance of human capital in the life-cycle of organizations and actively encourage the development of healthy and humane workplaces capable of attracting and retaining committed workers.

A second “funder” issue raised in the project consultations related to the recent development of “capacity-building” programs in Canada. In some disciplines and some parts of the country, there has been an increase in the number of programs devoted to organizational and managerial effectiveness, including capacity-building, stabilization, technical assistance, mentoring and consulting services, and organizational development programs offered by arts councils, foundations and government departments.

<sup>26</sup> Clore Duffield Foundation, Cultural Leadership: The Clore Leadership Programme Task Force Final Report, December 2002, p. 9 ([www.cloreduffield.org.uk](http://www.cloreduffield.org.uk)).

<sup>27</sup> Grantmakers in the Arts 1999 Conference proceedings: Leadership Development and Transition in the Arts ([www.giarts.org/conf\\_99](http://www.giarts.org/conf_99)), p. 9. The importance of solid governance policies is also described in detail in the Governance Policy of the Canada Council for the Arts, 2003.



While those consulted appreciated the availability of the programs, they raised these concerns:

- The programs are not available in all regions and disciplines;
- Where they do exist, there is a need for greater coordination to improve their effectiveness;
- In some cases, the cultural organizations do not have the money and/or staff to implement the changes proposed through a capacity-building or technical assistance consultancy; and finally,
- Because these programs will not last forever, their disappearance will have a destabilizing impact on recipient organizations unless we determine how to sustain their objectives over the long term.

## **Leadership Succession in Book Publishing**

While the Creative Management project has focused on managers in not-for-profit cultural organizations, we have been alerted to the parallel concerns about succession and leadership among Canadian book publishers.

Publishing houses are cultural industries but many also receive funding from federal and provincial arts councils. Like their not-for-profit colleagues, many Canadian publishing firms began life in the 1960s and 1970s, led by Canadians with a passionate interest in bringing Canadian writers to the public. Some of these publishers will reach retirement age within the decade ahead, and reports from the field indicate that they are having difficulties finding potential investors or buyers to take over their firms and carry on the work. The pressure to sell to non-Canadian buyers is especially difficult, given the strong commitment of these publishers to a Canadian-owned and operated sector.

Within the time available for this report, it was not possible to research this issue in depth. Nevertheless, we want to signal its potential importance and recommend that the Canadian Conference of the Arts, as the organizer of the Creative Management project, be ready to take the issue further when the results of an important examination are complete.

This examination is an on-line survey of shareholders and publishers in Canadian book publishing companies, undertaken by the Department of Canadian Heritage on the recommendation of its Finance and Succession Committee. The committee, made up of representatives from the publishing community, supports the department in its efforts to develop strategies to address current challenges in book publishing.

The survey has been disseminated to over 220 publishers and shareholders and deals with succession planning and retirement plans. The results will be available in mid-May and will provide a clear factual picture of the situation.

## **PROPOSED ACTION PLAN: RECOMMENDATIONS AND DISCUSSION**

The ultimate goal of this plan is to improve conditions so that our veteran managers will remain in Canada's not-for-profit cultural organizations as long as possible and another generation of qualified managers will be attracted to carry on their work in the future. To those ends, the plan recommends solutions to the challenges and problems described in the previous section.

Specific attention is focused on means of encouraging experienced managers to remain in the sector, including opportunities for their professional development and reinvigoration, and means of attracting the next generation to join and remain in the profession.

### **Recommendation 1:**

**In providing operating grants to not-for-profit cultural organizations, Canada's public sector funding bodies should make the development of healthy and humane human resource policies and practices an important criterion in grant decisions.**

This recommendation is addressed to the Canada Council for the Arts and the provincial and municipal authorities which provide operating assistance to not-for-profit cultural organizations. Its objective is to encourage organizations, through funding criteria and incentives, to take responsibility for their human infrastructure and by that means make the entire ecology healthier and more sustainable. Animated by the principal public funders, the sector must make a commitment to developing and nurturing its human capital.

Because this recommendation is directed to long-term systemic and attitudinal change, it may be the single most important recommendation in the plan. <sup>28</sup>

Depending on their capacity and current performance, an organization could manifest its commitment to improving conditions for human capital by such steps as:

- bringing the compensation and benefits it provides to its staff up to reasonable levels over time;
- maximizing the value of flexible working arrangements and other nonpecuniary benefits for staff;
- instituting a budget and providing time for staff training and professional development;

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<sup>28</sup> The Face of the Future report recommended advocacy to persuade public funders to develop funding criteria that encourage and reward "well-defined and humane human resources planning and practices (e.g., succession planning, leadership development, internships for emerging managers, availability of time and funds for staff training, adequacy of staff compensation, etc.)," p. 27.

- initiating succession planning for its administrative and artistic leaders,
- taking part in mentored internship programs and offering career advancement opportunities to emerging managers;
- taking steps to ensure that its board and staff reflect the diversity of the community in which they work; and
- providing training in board development and governance for its staff and board.

In recent years, many public sector funders have encouraged (and rewarded) organizations which undertake successful educational and outreach activities, stimulate youth participation in the arts, and respond to the increasing diversity of the population. Boards and managers have been attentive to these signals, and they have often had a beneficial influence on organizational priorities.

This recommendation urges funders to adopt a similarly progressive attitude about the human capital of organizations and its role in the health of the overall ecology. By indicating its concern about the human infrastructure of arts organizations, funding agencies will:

- help boards assume responsibility for the future of their institutions,
- provide support for managers who are trying to improve conditions for their staff,
- encourage experienced managers to stay in the sector, and
- encourage the development of workplaces in which young managers will find the working conditions they are seeking.

Five observations are important here:

- First, in partnership with sector organizations (as outlined in Recommendation 2), funding agencies will need to develop a transition plan to ensure the availability of appropriate tools, technical assistance, coaching or other forms of capacity-building guidance to help organizations improve their ability to integrate human capital issues into their strategic planning and operations.
- Second, developing healthy and humane workplaces will be a long-term process, and it will require that the funders can provide additional financial resources to organizations. As Recommendation 4 recognizes, there will be costs associated with both developing the necessary tools and providing increased core funding.
- Third, while respecting the overall orientation proposed, the funders will need to apply the human capital criterion with due recognition for the different capacities of different organizations.
- Four, the implementation of this recommendation by the Canada Council for the Arts is especially important because of the Council's national reach and scope. If the recommendation is also implemented by a wide number of public sector funders at the provincial and municipal levels, its impact will be enormously strengthened.
- Finally, for some funding bodies which already place a strong emphasis on issues of organizational health, this recommendation will not require much of a "stretch" and may need only a more explicit statement about the human capital

criterion or a stronger emphasis and weight. For others, the recommendation will be more radical. Funders who plan to implement this recommendation or have already moved in that direction may find that, by collaborating with one another, they can provide the tools the organizations will need in an effective and cost-efficient manner.

In the meantime, before this recommendation can be fully implemented, funding agencies should ensure that reasonable and legitimate administrative costs, including salaries and professional development, are not treated negatively by their program criteria or assessment committees. There may be cases where such costs should even be regarded as priorities.

In the last few years, a number of national arts councils, including the Arts Council of England, the National Endowment for the Arts, the Australia Council, Creative New Zealand, the Arts Council of Ireland, the Arts Council of Wales and the Arts Council of Northern Ireland, have identified management development and renewal as a key element in the sustainability of the arts and made this goal a core objective in their corporate plans.<sup>29</sup> Typically, they treat this goal as one of the three “pillars” of sustainability, the other two being improving artistic quality and increasing audiences and public participation in the arts.

Variations of Recommendation 1 have therefore begun to be implemented in other countries. For example, the Arts Council of Ireland is integrating training for arts managers into the business plans required of organizations applying for grants; setting minimum levels of expenditure on staff training in its multi-year funding agreements with arts organizations; and, as a condition of significant grants, reviewing current structures of governance and promoting better standards.<sup>30</sup>

## **Recommendation 2:**

**Led by the Cultural Human Resources Council, with financial support from Human Resources Development Canada, sector organizations should work together to develop and share human resource policies, tools, templates, and best practices. This should include developing an inventory of available HR tools and resources appropriate to the sector, identifying the additional tools that need to be designed and developed, and undertaking the work of creating and distributing these resources.**

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<sup>29</sup> The most recent corporate or strategic plans of these organizations are available on their websites: Arts Council of England ([www.artscouncil.org.uk](http://www.artscouncil.org.uk)), the NEA ([www.nea.gov](http://www.nea.gov)), the Australia Council ([www.ozco.gov.au](http://www.ozco.gov.au)), Creative New Zealand ([www.creativenz.govt.nz](http://www.creativenz.govt.nz)), the Arts Council of Ireland ([www.artscouncil.ie](http://www.artscouncil.ie)), the Arts Council of Wales ([www.artswales.org.uk](http://www.artswales.org.uk)) and the Arts Council of Northern Ireland ([www.artscouncil-ni.org](http://www.artscouncil-ni.org)).

<sup>30</sup> The Arts Council of Ireland, *The Arts Plan for 2002-2006* ([www.artscouncil.ie](http://www.artscouncil.ie)).

This recommendation is closely related to Recommendation 1. It is addressed to the sector with specific reference to:

- the Cultural Human Resources Council and the provincial sectoral councils,
- arts and cultural service organizations which provide professional development opportunities for managers,
- Human Resources Development Canada and the provincial ministries responsible for labour market and human resource development, and
- public sector funders implementing Recommendation 1.

As noted earlier, to stimulate a healthy HR culture, a transition plan which provides appropriate tools, technical assistance, coaching and other forms of capacity-building will be required. Fortunately, the sector is already involved in compiling and developing such tools and templates. Service organizations and sectoral councils are undertaking and supporting a wide variety of HR-related projects, many of them collaborative and cross-disciplinary, and they are excellent partners for the development and dissemination of the needed materials.

To cite a few current examples of “resources in the making”:

- The Alberta Cultural Action Network is in the final phases of a survey of cultural workers under age 30 which is identifying their career plans, needs and obstacles, with the aim of proposing specific tools to help these people develop careers in the cultural sector.
- CHRC has been holding meetings around the country to discuss the development of an HR strategy for the cultural sector, and it will be convening a national conference on the provision of HR tools and the development of a strategy in late November.
- The Cultural Careers Council Ontario is funding HR projects being carried out by service organizations, professional associations and other sector groups. These include:
  - a Joint HR Policy Working Group, led by the Arts Leadership Network, a consortium of Opera.ca, Orchestras Canada and the Professional Association of Canadian Theatres, to develop a model policy and best practices materials in written and web-based formats;
  - HR Resource Materials, a project of the Ontario Museums Association, the Directors’ Guild of Canada and PACT to customize key HR materials for use in the sector and assemble best practise cases, and
  - Research for Professional Development and Skill-Building Projects, a Theatre Ontario project to research, test and evaluate information to address skill gaps among managers in finance, publicity, and health and safety.
- The Conseil québécois des ressources humaines en culture is spearheading a pilot project in ongoing learning which involves funding positions for professional development coordinators within professional and regional cultural associations.

- The Cultural Management Institute, located at the Centre for Cultural Management at the University of Waterloo, offers a virtual PD “school” on-line for cultural managers. It presents learning modules on a variety of topics including HR issues such as working with cultural boards, revenue generation, and employment law. With new funding from Canadian Heritage and in partnership with l’École des Hautes études commerciales in Montreal, the CMI will develop a substantial number of additional modules and make all the material available in both English and French.

Finally, it should be mentioned that Canadian governments, businesses and the not-for-profit sector are making available an expanded number of resource materials relevant to HR management and practice, much of it on-line. The websites of the Canadian Federation of Independent Business and HRDC contain a great deal of pertinent and practical information.

Of particular use to not-for-profit cultural organizations is the website called Developing Human Resources in the Voluntary Sector ([www.hrvs-rhsbc.ca](http://www.hrvs-rhsbc.ca)), an outgrowth of the Voluntary Sector Initiative. A Good HR Practices Tool Kit is being established on this website as a one-stop shop of accessible and easy-to-use web resources for small and mid-sized not-for-profit organizations. The website currently contains links to employment laws and regulations in all Canadian jurisdictions. It will soon include a Guide to HR Policies and Practices and in-depth modules on key HR issues.

These and other existing resources should be taken into account in the sector’s work. Where relevant material is already available, it need not be “reinvented,” and the sector’s limited resources can be focused on developing those tools and templates that are particular to artistic and cultural practices or not available elsewhere and disseminating information about already-existing resources.

In a number of other countries, HR tools, guides and other materials are being made available by sector organizations and funding agencies. In New Zealand, one of the aims of the national arts council’s “Future Strengths” plan “is to help professional arts organisations build their management and strategic leadership skills.” To that end, the council has:

- launched the Creative New Zealand Professional Development Fellowships for Arts Managers;
- commissioned a practical guide called “Getting on Board: A governance resource guide for arts organisations”;
- contributed to the development of The Big Idea (a web-based networking tool which will include many resources related to work, career development, mentoring services and PD resources); and
- developed a partnership with the New Zealand Institute of Management to provide all the arts organizations the council funds with free membership, including reduced fees for arts management courses and regular participation in focus groups and forums.<sup>31</sup>

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<sup>31</sup> Creative New Zealand, Elizabeth Kerr, “Balancing arts and business objectives” ([www.creativenz.govt.nz](http://www.creativenz.govt.nz)).

### **Recommendation 3:**

**Among the tools proposed in Recommendation 2, information and training on the roles and responsibilities of boards, board recruitment and development, and sound governance policies and practices should be a priority for early development.**

This recommendation recognizes the urgency of the board-management relationship described in the previous section of this paper.

Boards are legally the employers in not-for-profit cultural organizations, and a clear understanding of their roles and responsibilities – by both boards and staff – is essential. To increase board capacity, improve understanding, and help organizations develop effective board recruitment and training practices and governance policies, the tools should address the training needs of boards and also of managers (in how to work effectively with a board). A board development curriculum created by professionals with experience working with cultural sector boards will be needed.

**Recommendations 4 and 5 below are focused on obtaining the necessary agreement for funds for both the development of “human capital” tools and resources and increased core funding for organizations and encouraging cooperation and coordination in achieving these objectives among the funding bodies.**

### **Recommendation 4:**

**To design the implementation of Recommendations 1-3 and ensure their financing, the relevant government agencies and departments should form working groups to obtain the funds required for the development of human capital tools and increased core funding for not-for-profit cultural organizations.**

**At the federal level, this group includes the Department of Canadian Heritage, Human Resources Development Canada, the Canada Council for the Arts, the Cultural Human Resources Council, and the Canadian Conference of the Arts.**

**At the provincial level, the relevant authorities are likely to include the arts council, the ministry responsible for culture, the ministry responsible for labour market and human resource development and, where applicable, the sectoral council.**

### **Recommendation 5:**

**To accelerate consideration and implementation of Recommendations 1-4, a discussion of this action plan, the Face of the Future report, and the national compensation study of the Cultural Human Resources Council should be scheduled for the next meeting of the national funders' group (the Canada Council for the Arts and the provincial/territorial councils and departments) and the next meeting of the federal, provincial and territorial deputy ministers of culture.**

### **Recommendation 6:**

**Interested foundations and public sector funding bodies should support pilot projects involving "cluster" management organizations which provide administrative services to cultural organizations and encourage them to include human resource services.**

There are a variety of ways in which the sector provides coordinated administrative services for individual artists and arts organizations, especially small- and mid-sized groups which have difficulty affording a manager or hiring additional staff.

Most notable are "cluster" management organizations such as those in dance and theatre which provide administrative support services, and the similar services offered for members and the local community by some municipal service organizations and community arts councils.

Funding bodies should be open to proposals to support these professional services and, where appropriate, help them extend their offerings to include the provision of HR advice and assistance. Since few not-for-profit cultural organizations have an HR professional on staff or contract and many have not yet developed formal HR plans and policies, this form of assistance could be highly valuable and cost-effective for the sector. Funding agencies should approach foundations which may be interested in a funding partnership to support innovative management tools of this kind.

**Recommendations 7-9 below address specific contributions that can be made, through collaborations between cultural management educators and sector practitioners, to improve our understanding of the relationship between education and workforce participation and define the knowledge, competencies and expertise required of managers, whether obtained through formal education or on the job. The findings of**



**these investigations could help to inform the future provision of ongoing professional development for managers as well as the content of educational programs.**

**Recommendation 7:**

**The Canadian Association of Arts Administration Educators (CAAAE) should undertake its intended survey of arts administration/cultural management graduates to gather information on employment status and barriers, and reasons for staying in or leaving the cultural sector, and disseminate the results to funders, service organizations and practitioners.**

**Recommendation 8:**

**As the organizer of the annual Chalmers conferences for arts service organizations and of the Creative Management project, the Canadian Conference of the Arts should host a meeting of educators and executive directors of service organizations to discuss ways in which the educators and sector practitioners can work together more closely and effectively.**

**Recommendation 9:**

**Arts and cultural management educators, the Cultural Human Resources Council and the provincial sectoral councils, working with service organizations representing practitioners, should undertake an examination of the knowledge, competencies and expertise cultural managers need now and in the foreseeable future; determine if there are gaps and needs in educational provision and on-the-job training that should be filled; and make recommendations to the appropriate authorities and the sector.**

The CAAAE intends to survey the graduates of Canada's college and university arts administration and cultural management programs to determine their work status and obstacles if any to their continuing participation in the sector workforce. This survey was also one of the recommendations in the Face of the Future report.<sup>32</sup> While there are potential problems about protecting personal information to be sorted out, this project could provide very valuable information for the educators and sector employers as well as future managers.

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<sup>32</sup> Face of the Future, p. 36.

The changes in the environment in which cultural managers work, described earlier, have been sudden and dramatic. As a result, the sector could benefit greatly from a concerted examination of the knowledge and expertise required of modern managers, and an assessment of gaps, if any, in the provision of this learning on the job and through formal education. The examination should draw on a wide cross-section of expertise from the community.

Following this investigation, it may prove useful for the educators and sector organizations to examine means of “validating” the profession such as certification, accreditation, competency development, and benchmarks/best practices, and advise the cultural community on the most appropriate model or models.

### **Recommendation 10:**

**To provide professional development, skills development, and peer networking opportunities for cultural managers at all career levels, public sector funders should offer focused, systematic and more substantial support to municipal, provincial and national service organizations which furnish these services.**

Professional development opportunities are urgently needed by cultural managers from the most junior to the most experienced.

At present, the main PD opportunities which cultural managers, emerging or established, access are the annual general meetings or conferences of service organizations (municipal, provincial and national) and occasional events, seminars or workshops offered by service organizations, local arts councils, and local associations of managers.

For the most part, these opportunities occur infrequently and the resources available for making them more widely available are limited since the host organizations usually do not have funds dedicated to PD and must use their operational funding to that end.

More systematic, substantial and focused funding to service organizations and other professional associations to deliver professional development could bring these results:

- For the sector, a deeper appreciation and understanding of the value of continuous learning and experience in identifying and sharing effective models that may have broad application in the sector.
- For individuals, enhanced skills and leadership development and career advancement opportunities, strengthening their capacity to solve problems and learning from others in the discipline or across disciplines.

Recent studies indicate that arts managers often do not access available PD opportunities because of barriers such as cost, geographical location, time and their own or their employer’s reluctance to finance training and professional development.

While it is difficult to sort out which of these barriers may be the most important (and individual responses probably vary greatly), one major study has made the point that the sector itself must take responsibility for the ongoing professional development of its members and that when senior leaders in the field explicitly espouse continuous learning and development, other managers will begin to take it more seriously.<sup>33</sup>

Many of the most successful professional development activities rely on a method of learning – peer networking – which the cultural sector widely considers one of the best means of development and growth. Peer networks can be unstructured and fairly informal; they can be quite formal, or they can combine informal and structured activities. They can be cross-disciplinary or for a single discipline only, and they can focus on technical professional skills or wider-ranging “leadership development” capacities.

Experts in the provision of learning opportunities for professionals point out, as one study recently put it, that

“the development of effective leaders and organizations is accelerated through three kinds of learning relationships: (1) networks of colleagues and peers who share their challenges, (2) coaches or mentors who help develop their potential, and (3) experts who provide specialized or objective assistance.”<sup>34</sup>

Where possible, funding for PD activities for managers should favour cross-disciplinary initiatives to broaden the learning base of the participants, help generate fresh ideas and collaborations, and foster a sector-wide sense of responsibility for professional development.

Applicants should also be encouraged to undertake their projects in partnership with an educational institution which can provide structured content, that is, develop curriculum, provide course content, and furnish instructors and facilitators. While Canada has less experience than some other countries in integrating educational institutions into sector-driven professional development work, some recent partnerships have included the Edmonton professional development activities organized by the Edmonton Arts Council, the Arts and Cultural Administrators Association and the Grant MacEwan program in arts and cultural management, and the Arts Leadership Network, administered by PACT, Orchestras Canada, and Opera.ca and supported by arts management faculty from York University.<sup>35</sup>

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<sup>33</sup> Barlow, Cann, and Smalley, Professional Development for Performing Arts Managers in Canada: A Needs Assessment, p. 7.

<sup>34</sup> Audrey Newman, Built to Change: Catalytic Capacity-Building in Nonprofit Organizations, a sabbatical report for the David and Lucile Packard Foundation and the Nature Conservancy, April 2001 ([www.geofunders.org](http://www.geofunders.org)).

<sup>35</sup> Partnerships between sector service organizations and educational institutions are particularly well-developed in the United States. Stanford University’s Graduate School of the Business is the site of a new Executive Program for Nonprofit Leaders in the Arts, offered with the US National Arts Stabilization program. The School of the Art Institute of Chicago played a prominent role in the National Arts Administration Mentorship Project funded by the NEA and US foundations to provide fellowships and mentoring for young arts managers. Drexel University’s graduate arts administration program provides the academic resources and research to develop

A newly announced project involves the Royal British Columbia Museum, the Provincial Museum of Alberta, and the University of Victoria in a Museum Leadership Development Program. It is designed to develop “institutional management capacity” and combines formal courses at the university with workplace learning at both museums. The university is developing the curriculum and instructional resources as part of its graduate level certificate in public administration.<sup>36</sup>

Variations on this recommendation for support of sector-based PD initiatives have been launched in other countries.

- In its Strategic Plan for 1999-2004, the National Endowment for the Arts identified “Organizational Stability: to strengthen the organizational and financial capabilities of America’s arts organizations” as one of its corporate goals. Its program of Services to Arts Organizations and Artists supports projects to develop future leaders and enhance the skills and competencies of those already working in the field. Most of the grants are provided to arts service organizations and professional associations to allow them to deliver PD, skills development, leadership training, and technical assistance through workshops, conferences, regional forums, peer networking forums, and other means.<sup>37</sup>
- The Australia Council for the Arts, having identified “developing and promoting the best management and governance practices in arts organisations” as a corporate goal, is supporting strategic business planning skill development and PD workshops for senior managers. Through a program called “In the Running” it is also providing emerging managers with grants to develop their skills in finance, management, marketing and governance.<sup>38</sup>
- A major initiative of the Arts Council of England, called Continuing Professional Development for Artists and Arts Managers,” brings together key consortia, service organizations and networking organizations “to promote and increase access to professional development opportunities that enhance artistic or management practice, employability and personal development.”<sup>39</sup>

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curriculum and benchmarks for the Philadelphia Cultural Management Initiative of the Pew Foundation.

<sup>36</sup> The University of Victoria’s press release is available at [www.uvcs.uvic.ca/crmp/mldp](http://www.uvcs.uvic.ca/crmp/mldp).

<sup>37</sup> National Endowment for the Arts, Strategic Plan 1999-2004 ([www.nea.gov](http://www.nea.gov)).

<sup>38</sup> Information is available on the Australia Council website ([www.ozco.gov.au](http://www.ozco.gov.au)).

<sup>39</sup> Arts Council of England, Continuing Professional Development (CPD) for Artists and Arts Managers ([www.artscouncil.org.uk](http://www.artscouncil.org.uk)).

## **Recommendation 11:**

**To attract and develop new cultural managers, current internship programs should be maintained and improvements pursued to facilitate mentored workplace-based career development internship opportunities.**

This recommendation is addressed to the federal and provincial ministries responsible for human resource and labour market development and the sectoral councils.

Canada has a variety of internship opportunities which serve a broad number of occupations in the cultural sector, ranging from student placements to government wage subsidies, government youth internships, and short-term positions in cultural organizations. These are often open to new or emerging managers, and a few programs (such as the CHRC's Youth Internship Program funded by Canadian Heritage) explicitly encourage applications in this field.

The need for internship programs could not be clearer. Cultural organizations clamour for interns, and most programs report a high percentage of interns remaining in the sector after finishing the program.

Evidence suggests that early on-the-job experience in the cultural sector greatly increases the likelihood of ongoing employment there. In examining the transition from post-secondary education to the workforce, Statistics Canada has pointed out that over 80% of cultural graduates do not work in a cultural field. But the chances that they will work in the sector rise greatly **if** they have had work opportunities through an internship, mentorship, apprenticeship, or short-term job. Graduates with as little as six months prior experience in the cultural sector have odds of working in the sector that are **seven** times greater than those without such experience.<sup>40</sup>

Unfortunately, many internship programs suffer from one or more of these weaknesses:

- lack of consistency (they tend to come and go as funds are available);
- short duration (they usually last under one year and sometimes no longer than six months),
- limitations by age and employment status (federal HRDC programs, for example, are limited to unemployed or underemployed youth 30 years of age and younger),
- limited pay, in particular the lack of a stipend for the mentoring organization (typically in most government programs the intern is paid on a matching basis by the government and the host organization, and no pay is available for mentoring).

As a result, many programs are not ideally structured for individual career development and mentored learning.

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<sup>40</sup> Statistics Canada, "Labour market outcomes of arts and culture graduates," by Jacqueline Luffman, Focus on Culture, Vol 12, No. 3, Fall 2000, pp. 3-9.

While all existing internship programs are urgently needed, the sponsoring departments and sectoral councils should be encouraged to promote improvements wherever possible and over time work toward programs for mentored workplace-based career development internships. These programs should include but not be limited to young people and should have as their goal enhancing the interns' skills and career potential, deepening their interest in the profession, and developing their networks and contacts in the field. The internships should last at least one year (preferably two), be based on a mutually agreed mentoring/learning plan, and provide a reasonable payment to the intern and a reasonable stipend to the mentoring organization.

As the challenge of diversifying the workforce described in the previous section indicated, particular attention should be paid, in developing improved internships, to initiatives that encourage new entrants in cultural management from Aboriginal and culturally diverse communities and provide appropriate training and career advancement opportunities.

While sectoral councils and human resource/labour ministries work toward these better programs, the sectoral councils should consider the possibility of "partnering" on their existing internship programs to expand the length of the training period.

## **Recommendation 12:**

**Public sector funders which give operating grants to not-for-profit cultural organizations should provide opportunities for sabbatical leaves for senior managers and mentored career advancement for mid-career managers.**

A "Triple Win" program which combines mentored career advancement and sabbatical opportunities was initially suggested by the general manager of a theatre company. The idea aroused great interest when it was raised in the Creative Management Phase 1 report.

Many senior managers would like the opportunity of a sabbatical leave from their positions to take time for professional growth, prevent burnout, or simply enjoy a respite from their duties. It is possible that an opportunity for renewal of this kind might make it easier for managers to remain in the sector. But at the senior level, leaders cannot consider taking time off unless their organizations can be left in the hands of another capable person.

That opportunity is seldom available in cultural organizations because there are too few employees, the employees are already over-worked, and many of the staff positions which in the past developed future leaders have been eliminated. Thus, any serious attempt to provide professional renewal for senior managers has to solve the problem of continuity in their organizations.

At the same time, there is a group of mid-career administrators who would enjoy the chance of enhancing their own leadership abilities and taking on greater leadership challenges after suitable preparation. Providing a mechanism to help both the senior

and mid-career administrators and provide continuity in the management of the arts organization is the challenge here.

This recommendation proposes that a mid-career administrator have the opportunity to “shadow” the senior leader and be mentored by that leader for a given period of time. During this period, the senior leader would “bank” a portion of his/her salary and train the other person in all aspects of the job. At the end of the period, the senior leader would take a sabbatical leave at partial salary, while the mentored person acted as the general manager/executive director during the absence.

The program would benefit simultaneously the senior leader, the mid-career professional, and the organization itself (hence “the Triple win”). Ultimately, it would also benefit the sector as a whole. Its benefits would include:

- For the field, professional renewal, future leadership development, and reinvigoration of the profession.
- For individual managers, renewal and refreshment for the senior leader and mentoring and work experience in a more challenging position for the mid-career manager.
- For the organization, the security and continuity of competent senior leadership during the sabbatical leave.

A program like Triple Win is probably best administered within the operating grant programs of the arts councils and coordinated, as appropriate, with grants made through the councils’ capacity-building programs.

**The two recommendations that follow (13 and 14) address issues related to programs which rely on mentors and consultants to provide technical assistance to improve the capacity and effectiveness of cultural managers and organizations.**

### **Recommendation 13:**

**The Canada Council for the Arts and the Department of Canadian Heritage should organize a meeting which brings together federal, provincial and foundation funders of capacity-building, stabilization, and organizational development programs to share information, improve coordination, build a bank of best practices, and discuss related issues.**

### **Recommendation 14:**

**The Department of Canadian Heritage and the Canada Council should undertake a study of existing mentors in the Canadian**

**cultural sector, determine the need to train additional mentors, and develop means for doing so. The study should be undertaken in consultation with capacity-building, stabilization and organizational development programs and universities, colleges and specialized training institutions.**

As discussed in the previous section of this paper, the proliferation of capacity-building and related programs is a healthy development for the sustainability of the cultural sector but improved coordination among those programs is urgently required.

A meeting bringing together the administrators of these programs should address the coordination issue, begin establishing a bank of best practices to share with the community, and consider how to ensure that consultancy plans developed through the programs can be implemented.

Finally, the meeting might usefully look ahead to a future in which some or most of these programs have finished and discuss how to prepare organizations for that eventuality and avoid destabilizing the sector.

A study on mentorship is a logical corollary to this meeting. Capacity-building and stabilization programs draw heavily on the skills and professional expertise of mentors and other arts specialists and consultants. Ways of providing support for existing mentors and training additional mentors need to be addressed fully and cooperatively.

**Recommendations 15-18 below are intended to stimulate momentum and ensure follow-up for the work of the Creative Management project, the Face of the Future report, and the national compensation study through the development of a national HR strategy, stronger and sustained support to provincial sectoral councils, increased awareness and advocacy by service organizations, and a steadfast commitment from the Canadian Conference of the Arts to pursue implementation of this action plan.**

#### **Recommendation 15:**

**As recommended by Face of the Future, the Cultural Human Resources Council should develop and lead a national human resources strategy for the cultural sector, taking into account the recommendations in this plan; promote professional HR policies and practices for cultural managers across the sector, and promote cultural management as a viable career choice among students, educators, and cultural workers.**



**Recommendation 16:**

**As Human Resources Development Canada devolves responsibility for labour market development to the provinces, the provincial authorities working with the sector should develop sectoral councils in culture and ensure that they are adequately funded and supported.**

**Recommendation 17:**

**As follow-up actions to this study and to increase awareness of the importance of management development and retention, CHRC should disseminate the findings from its national compensation study widely and service organizations should encourage their members to bring the compensation study and the Creative Management action plan to the attention of managers, staff and boards.**

**Recommendation 18:**

**Working in partnership with the CHRC and service organizations, the Canadian Conference of the Arts should continue its involvement in cultural management issues, working to bring together the various stakeholders to implement this action plan and continuing to be a member of the Advisory Committee to the project on Developing Human Resources in the Voluntary Sector.**

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