Transforming Together: Systemic Change for Community Benefit

The Merger of Ottawa Arts Council and Arts Network Ottawa

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Introduction

Beyond a Merger: Long-Term Solutions for a Thriving Arts Sector

Our merger is a **long-term strategy for systemic change** in Ottawa's arts sector.

We (the board and staff of Ottawa Arts Council and Arts Network Ottawa) are reimagining how Ottawa's arts sector is supported and represented. By combining resources, decentralizing leadership, and prioritizing equity, we aim to tackle today's complex challenges and position the sector for future growth and innovation.

We are creating a centralized, collaborative hub for innovation where artists, arts organizations, funders, and the community can unite to tackle complex challenges and drive creative solutions.

This merger is not a response to immediate pressures; both organizations are in good standing with strong relationships in the arts sector. We realized we cannot continue to operate and deliver services as we did pre-pandemic. Our merger is a direct response to the many persisting long-term challenges the arts sector has been facing, i.e. accessible and affordable spaces, funding, audience development, and equity.

Now, we are taking a different approach to address these challenges. Our merger is a crucial strategy for driving change through a collaborative and inclusive model, fostering deeper community relationships and promoting innovation.

Lessons from this merger process and the 40-year history of Ottawa Arts Council (OAC) and Arts Network Ottawa (ANO) can help build a healthier arts sector.

This case study outlines successful strategies and practices, offering a guide for other nonprofits considering similar transformations. We share the challenges we faced and how we addressed them, and our process of co-designing and building trust among interest-holders, community members, and partners.

Transparency proved to be crucial in this process. Clear and honest communications helped to gain community support and buy-in, essential for the merger's success.

We hope this study encourages other organizations to see mergers as a chance to improve service efficiency and community engagement, inspiring similar collaborative approaches across sectors, fostering cooperation and innovation.

Why Did We Merge

Why We Merged? Addressing Arts Sector Challenges with Unified Leadership and Systemic Change

For more than 40 years Ottawa Arts Council and Arts Network Ottawa worked independently with similar missions to support, promote and develop the arts, adapting to the shifting needs and priorities of the sector over time.

We have always been driven to respond to the challenges in the arts sector and feel that now is the right time to take a different approach. By coming together, we can provide a stronger, more unified response to the complex issues facing the arts community in Ottawa.

5 reasons why our organizations decided to merge:

Reflecting on our Roles as an 'Arts Service Organization'

We asked ourselves, "If we were to start again, how would we build a new organization, what would its functions be, and what form would it take?" This led us to reimagine how we could better meet the Ottawa arts community's needs by redefining 'arts service.'

We considered the role of an 'arts council' or 'arts service organization' in the post-pandemic arts sector. What services should it provide, and what is its relationship to the community it serves?

Our origin stories:

> The **Ottawa Arts Council** (previously Celebrations Ottawa, later Council for the Arts in Ottawa) was established in 1982 with a mandate to advocate for the arts in Ottawa, connect artists of all disciplines and backgrounds by providing information, skills development, the production of a festival, and to establish a municipal arts centre in the urban core.
>
> Following significant financial obstacles, the Council re-examined its mandate in the nineties to focus its efforts as an arts service organization. With increased financial resources, the Council solidified its role as an arts and culture advocate.

> **Arts Network Ottawa** began in 1980 as Arts Gloucester, a volunteer umbrella organization. In 1987, Gloucester Arts Council incorporated as a non-profit charity. In 1997, they signed a purchase of service agreement with the City of Gloucester to provide services and professional assistance to groups, becoming the first arts council in Ontario to do so with their municipality. The following year a similar agreement was signed with the Township of Cumberland. The organization rebranded to Arts Ottawa East after the

City's amalgamation, then to AOE Arts Council in 2009 to reflect its city-wide mandate, and then in 2018 to Arts Network Ottawa.

Both organizations champion arts and culture through services, programs, and advocacy initiatives.

There is no consistent definition in Canada for what an 'arts council' or 'arts service organization' does. Generally, they have a mandate to provide services to artists, arts organizations, and arts workers.

Both our organizations have seen shifts over the years in what services we deliver.

From 1980-mid-2010s, services were primarily opportunities and events for artists to showcase their work, such as exhibitions, festivals, and fairs. Published magazines and event calendars were essential services to help audiences and artists connect, later moving to online event calendars and social media promotions to 'get the word out' about local arts events. As the arts sector grew, and with it more opportunities for artists and audiences to connect, we shifted to other areas of services.

Professional development for artists and arts workers has been a core service, focusing on the 'business' side of being a professional artist with skill development workshops, mentorship programs, speaker series and conferences. As well, each serving as a representative 'voice' of the arts community in government relations and advocacy has been a consistent service throughout our histories.

If we are looking to address the overlap between our two organizations, how do we also take into account the overlaps in services with other arts groups in the community? How do we define services, and what is the scope of our interventions?

With new arts networks emerging, each with a unique place in the arts ecosystem, what is *our* unique place? Key reflections we have had in this process focus on the relevancy of our services and our role in the community.

We have also reflected on the perceived limitations of working within a nonprofit model, the requirements around a formal board of directors, and the regulations surrounding being a registered Canadian Charity.

The board of directors plays a crucial role in shaping and guiding an organization's vision, with a significant fiduciary responsibility to ensure its success. The board structure is designed to reflect the interests and needs of our members, particularly the local arts community. In the case of our two organizations, however, it has been many years since new members have been fully recruited from within the membership itself, and instead, new board members are often brought in through open calls or the network's active directors. This has resulted in diminished representation of our members on the board. Additionally, as a charitable organization, board members are not compensated for their time and efforts. Given that many artists are gig or contract workers, they often face socio-economic challenges, making it difficult for them to commit to a long-term, unpaid volunteer role on the board.

The membership structure itself raises the question of how to build a more inclusive organization on top of an inherently exclusive model. Despite expansions in the organizations' reach through its many programs and the population growth in Ottawa, membership numbers have not seen significant growth. In 2020, ANO transitioned to a 'pay-what-you-choose' model for membership fees, hoping to lower financial barriers and attract a broader base. However, this shift has led to only a slight increase in membership numbers, indicating that there may be deeper challenges to fostering a more inclusive and engaged membership community.

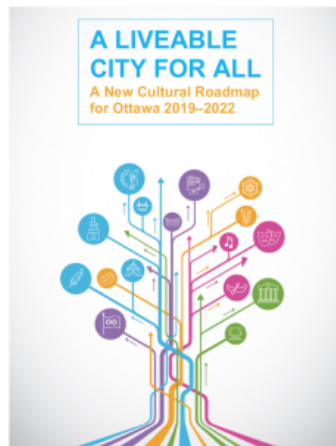## Ottawa's Civic Arts Action Plan and Longstanding Vision

This merger is part of a broader vision for transforming Ottawa's arts sector and builds on important civic arts policies and recommendations, from both municipal and community-led plans.
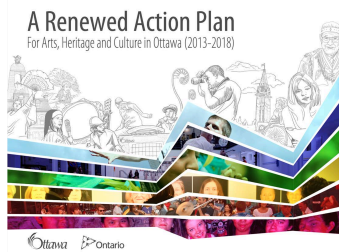
In 2012, the City of Ottawa's Renewed Action Plan for Arts, Heritage, and Culture (2013-18)[1] identified the need for an independent, arms-length arts authority to provide leadership, services, and support for the local arts community. Both organizations – Ottawa Arts Council and Arts Network Ottawa – championed this vision, laying the foundation for sectoral transformation.

The Arms-Length Cultural Development Feasibility (2017-18) advanced recommendations of the Renewed Action Plan, examining and assessing the state of culture in Ottawa, and the current sector development and funding situations. It investigated a series of alternative models that might better serve the cultural sector and considered the most beneficial course(s) of action.

Building on this foundation, *A Liveable City for All: A New Cultural Roadmap for Ottawa 2019-22*[2] highlighted the importance of consolidation and collaboration within the cultural sector. Many of the key recommendations, and specifically Recommendation 1.2, called for renewed sector leadership through a review of cultural organizations and networks to explore opportunities for consolidation, greater collaboration, and more efficient, diverse, and inclusive representation. This recommendation underscored the need to optimize how the sector is organized, as well the City of Ottawa's support functions.

The summary of priorities from both reports are consistent with the needs and priorities identified by the community through the merger engagement process.

Shared Goals, Strategic Fit and Strengthened Capacity

Our organizations share a strategic fit in goals and missions.

By combining resources, we can pool expertise, consolidate services, and streamline operations to create a more robust organization. Eliminating overlapping efforts, processes, and operations will allow us to redirect resources for greater impact in the arts sector. We will be better equipped to provide meaningful support and deliver deeper impact.

It is important to consider that if we only merge to build operational capacity and align shared goals and mission, without a specific focus on systems change or equity, we would find ourselves in the same place as before.

We knew we needed to implement structural changes that embed equity in the governance and operations of the merged organization. Only then can we influence change in the sector.

Addressing Systemic Inequities Through Structural Change

Equity and inclusion are critical challenges in the arts sector. Systemic barriers limit access to funding, opportunities, and representation for marginalized and equity-deserving groups.

The COVID-19 pandemic and lockdowns highlighted deep vulnerabilities and significant weaknesses in this realm. The sector faced unprecedented challenges that amplified existing inequities, including financial instability, loss of opportunities, and reduced access to resources. There would be no return to the traditional ways of operating. This underscores the need for our services to go deeper, enacting systemic change in the sector.

The ANO/OAC merger provides an opportunity for us to build an organization that centres equity in its operations, leadership, and decision-making structures. Merging two organizations and maintaining the same governance and operational model would leave structural inequity issues unchanged, offering only a surface-level solution. We needed a process to reimagine the organizational and governance structures.

Unifying Advocacy Efforts for Greater Impact

Historically, fragmented arts advocacy efforts in Ottawa have limited the sector's ability to effectively advocate for resources and policy changes, as outlined in the *Civic Arts Plan* above.

By consolidating our advocacy efforts, we create a stronger, more cohesive organization capable of influencing policy at local, provincial, and national levels.

This stronger advocacy position can enhance our ability to engage with policymakers, funders, and community interest-holders, amplifying the arts sector as a vital contributor to Ottawa's social, cultural, and economic development. It can better position the sector to address local and systemic challenges, including funding inequities and representation gaps.

If we are better positioned to champion artists and arts organizations through a unified voice we can more effectively mobilize cultural initiatives that benefit the entire city.

The Merger Process

We have outlined the steps and phases we have navigated in this merger and organizational transformation process.

Trust and Process Building

Long History of Collaboration

Since 2000, when the City of Ottawa amalgamated, the staff and board of the Ottawa Arts Council and Arts Network Ottawa have discussed the possibilities of a merger.

The organizations worked collaboratively on arts advocacy, including in the early 2000s on Ottawa's first Arts and Heritage Plan ([Ottawa 20/20 Arts and Heritage Plan](#)). Preliminary merger discussions were held by staff and boards, but ultimately it was determined that each organization would be stronger in achieving unique goals for the community as separate organizations at that time.

Over the next two decades our collaborative work continued: both organizations partnered with the City of Ottawa and on Join the Crowd, an arts awareness campaign; a community-wide campaign called My Ottawa Includes Culture in 2004 that stopped a proposed 80% cut to Ottawa City Council arts funding; and in 2008 partnered to run Our Ottawa Still Includes Culture, another rally in response to a City Council proposed 54% cut to arts funding. Both organizations participated on the Steering Committee and in consultations that resulted in the City of Ottawa's *Renewed Action Plan for Arts, Heritage, and Culture (2013-18)*.[1]

In 2015, the two organizations co-formed Ottawa Cultural Alliance with five other cultural umbrella groups to undertake joint initiatives to strengthen Ottawa's cultural sector. From 2017-2019, the Alliance completed a community-driven, community-wide Arms-Length Cultural Development Feasibility Study, hosted an Ottawa Culture Summit, and facilitated the creation of this new community-driven [A Liveable City for All: A New Cultural Roadmap for Ottawa 2019-22](#).

Building Trust (Not Turf)

Or, collaboration over competition.

Our recent collaborations consistently demonstrated that we can achieve greater impact for the arts sector through partnering on services and on joint advocacy initiatives. It also built trust among staff and boards.

Our two organizations reinforced our partnership through the COVID-19 lockdowns. As the priorities and needs in the local arts sector were heightened, a stronger unified approach

continued to be taken by the organizations and consistently saw increased impact and results when working in collaboration.

Operationally, the biggest barriers to collaborating effectively was capacity. As the organizations operate on similar timelines, we experience heavy workloads at the same time (i.e. for grant writing, audits and annual general meetings). This slowed down staff's capacity to contribute to collaborations.

The organizations have, for over twenty years, consistently fielded questions about the presence of two arts service organizations in Ottawa. The mission and service overlap was clear as we struggled to define what the key difference was between the two organizations. This led to renewed conversations about merging the organizations, or delineating services to reduce overlap and competition.

Before any further steps could be taken, we first reviewed a resource called Turf, Trust and the Collaboration Spectrum (tamarackcommunity.ca), and found ourselves much closer on the 'trust' side than we thought. Through the success of our collaborations, and in recognizing the large systems change we wanted to affect in the sector, there was less need to hold on to the distinct boundaries of each organization (turf).

Exploring the Merger

The first step of the merger was engaging the board executives and testing their comfort with this concept. They had many questions, but before proceeding or starting public discussions, we wanted to formally evaluate the alignment. We conducted an initial assessment of the mission, values, and goals of both organizations.

In the summer of 2021, we self-financed the engagement of Brynaert Brennan & Associates, a business consultancy firm, to conduct an in-depth financial analysis of both organizations. We explored the financial health and stability of each entity, including assets, liabilities, and funding sources.

The outcomes of the analysis were resoundingly positive. Key observations included:

1. The mission, strategic goals and activities of both organizations are highly compatible. Areas of specialization are complementary.

2. Some programming overlap could be streamlined, including membership services, communications and fundraising.

3. Human resources and operational expenses are organized along similar lines. The duplicate spending could be reallocated to expand the new organization's programs and services.

4. The financial management and financial positions of both organizations are healthy. The consultation concluded that "no financial impediments to an amalgamation between ANO and OAC."

At this stage, we actively engaged with key internal interest-holders, including board members, staff, and funders to understand their perspectives. This process created an environment of 'yes,' generating excitement, openness and curiosity about the process and its possibilities.

We also evaluated potential risks and developed mitigation strategies to address those risks during the process.

Funding the Merger: Securing Project Grants

Securing funding was a key accelerator for the merger process.

In late 2021, there was hesitation on how to proceed due to significant internal operational and HR changes in both organizations. Moving forward required a significant budget and dedicated leadership time. Neither organization had access to unrestricted funds to invest in this endeavour, and the grant programs available did not seem to fund this type of internal capacity building at the scale that would be needed.

The motivation to continue came from the Ottawa Community Foundation, which showed leadership among funding agencies, highlighting:

> The [Community Grants Program] continues to fund across a wide range of issues and types of initiatives. But at this time of additional stress on many organizations, we want to ensure that potential applicants know that we are very receptive to supporting the exploration and the development of organizational collaborations, partnerships, or mergers, to ensure ongoing and improved capacity for an equitable, healthy, and sustainable city.
>
> (Ottawa Community Foundation November 22, 2021 e-newsletter)

Soon after, a similar funding opportunity came from the Canada Council for the Arts with the announcement of the new Strategic Innovation Fund:

> Our goal is to support a range of artists and arts organizations, throughout their innovation journeys, to create meaningful change in the arts sector and beyond.
>
> (Canada Council for the Arts November 30, 2021 e-newsletter)

Other opportunities became available over the next year from the Government of Canada's Community Services Recovery Fund through the Community Foundations of Canada, CAPACOA (Presenters Capacity Building Program), and the City of Ottawa (Capacity Building).

These grants emphasized capacity building, leadership development, and initiatives that promote growth in the arts sector.

With dedicated funding for the project, we would be able to proceed without interrupting our services to the community.

All together, we secured $160,500 from project grants to fund our work on the merger process.

Scope and Process Change: Lessons from False Starts

Our original approach was to engage our members and the arts community to determine if the two organizations should merge or delineate their services and missions.

From mid-2022 to April 2023, we engaged local consulting services to oversee a phased process for interest-holder engagement.

The idea was that the decision to 'merge or delineate' should involve our members and community, so we proceeded with a standard process to set up community engagement. One step was forming an Advisory Group with local experts in finance, risk management, communications, human resources, equity and inclusion, and community artists.

We encountered roadblocks in building momentum for the merger exploration. We struggled to balance the workload of this process with the ongoing programs, services, and operations of both organizations. This made finding a starting point difficult, as focus easily shifted back to current programs instead of the merger.

Another significant roadblock was the project's starting position. Comfort with the idea of merging grew among the staff and board as a culture of trust developed. Even in these early stages, our teams wanted to discuss the plans to merge, rather than to keep discussing "whether we should merge." The Advisory Committee noticed this disconnect at their first meeting in April 2023, as from their perspective, a merger was inevitable. They essentially asked, "if a merger was the outcome, what is the community being engaged for, and what role does the advisory committee play?"

In May 2023, we marked a significant shift in the process' direction, as it was formally decided that the two organizations would merge into one.

The shift **presented a strategic opportunity to re-evaluate and redefine organizational and governance structures, the** starting point of the merger design process.It was an opportunity to reinvent our organizations and our service delivery.

We were driven to shift the narrative to share that we were planning to merge, and wanted to work with the arts community to learn what the form and function of an Ottawa arts leadership organization should be and what relationship our interest holders want with this new organization.

There was now no immediate role for the Advisory Committee. Some members were engaged in other sessions related to their areas of expertise, as needed.

New Methods

Merger Design Methodology: Human-Centered Design

We were supported and guided by a consulting firm, EVOKE Culture 2.0. They applied a Human-Centered Design (HCD) approach, which prioritizes community voices and aligning priorities with the capacities and goals of the organizations involved. By employing HCD, the process minimized risk by co-designing solutions directly with end-users, breaking down the project into incremental, testable stages, and actively seeking feedback to validate progress.

What is Human-Centered Design? HCD is a problem-solving approach that emphasizes creating solutions — like products, services, or organizational models — by focusing on the needs, preferences, and experiences of the end-users. In this case, those "users" were the artists, arts organizations, and community members of Ottawa. This strategy ensured that the solutions developed were both practical and user-friendly for artists, and allowed us to foster community trust and active participation.

Driving Systems Change - Shaping Ottawa's Arts Future through Equity, Collaboration, and Collective Action

A Model for Systems Change in the Nonprofit Arts Sector

This merger can serve as a groundbreaking model for transformative change in the nonprofit sector. It reimagines the operations and the power of collaboration in overcoming challenges and fostering sustainable growth.

This proposed prototype organization and governance model (outlined Section Model Prototype - Arts Ottawa Testing Collective Leadership) represents far more than a simple restructuring; it is a strategic, systems-level intervention aimed at addressing deep-rooted challenges faced by the sector. Its goal is to fundamentally reshape how organizations collaborate, engage with communities, and deliver services, signaling a shift toward a more integrated and resilient arts ecosystem.

"We fully acknowledge that embracing emergent processes within the arts community can create discomfort and involve risk. However, by centering this collective impact effort, we have begun to see new ways for artists and arts workers to collaborate and break traditional boundaries. The arts sector needs to invest in more relational approaches to systems transformation because the current models of collaboration—often rooted in competition and mere cooperation—are not sufficient to address the complex challenges facing local organizations and artists. Achieving more radical and realistic outcomes requires equally radical methods of working together, which, though difficult, are essential.

To support this shift, we must draw on established social innovation frameworks, such as the Constellation Model and the Collective Impact Model. These approaches provide depth and clarity, reinforcing our strategic direction for fostering deeper collaboration. Arts leaders and funders must move out of their comfort zones, building trust and offering support to organizations that are exploring these new, often difficult, ways of working, all while continuing to ask hard and necessary questions."

– Annalee Adair, EVOKE Culture 2.0

How the Model Prototype Will Drive Systems Change

What is Systems Change? Systems change refers to the intentional actions taken to shift the conditions that hold a problem in place. This can include structural, cultural, or relational shifts that create new opportunities for collective impact.

In this merger, systems change is achieved through several key strategies:

1. Breaking Down Silos
The model prototype dismantles traditional organizational silos, creating a more interconnected and collaborative arts ecosystem. Silos often exist between artistic disciplines, between the arts and other sectors, and between cities and regions. Merging to pool resources and consolidate services can foster greater alignment across the sector, encouraging organizations to work together toward shared goals. This integrated approach enhances the sector's capacity to respond to challenges collectively and with greater agility.

2. Collective Leadership and Decision-Making
This is a shift in governance — moving from hierarchical, top-down decision-making models to collective leadership. By ensuring that artists, arts organizations, and community members have a seat at the table, we distribute power more equitably and empower those with lived experience to shape the future of the arts in Ottawa. This approach prioritizes inclusivity, transparency, and responsiveness, essential pillars for sustainable systems change.

3. A Proactive Response to Emerging Challenges

This is a forward-thinking strategy designed to ensure long-term resilience and sustainability. By proactively addressing the vulnerabilities exposed during the pandemic, this merger builds an arts service organization that is adaptable to evolving challenges—whether social, economic, or cultural. This resilient infrastructure helps future-proof the sector against uncertainties while unlocking opportunities for growth and innovation.

4. Community-Led Transformation

Systems change is only effective when rooted in the needs of the community.

The model prototype was shaped by extensive community co-creation and engagement with over 450 contributors. By keeping the community's voice central, the new organizational model is reflective of, and responsive to the needs of, Ottawa's arts ecosystem. This community-driven approach builds trust and fosters a sense of ownership. The model prototype is flexible and adaptable, its testing and implementation can continually evolve to meet the needs of the arts community in Ottawa.

We are collectively building a more sustainable and resilient organization that can lead the sector through future challenges, with a community that is deeply engaged in the organization's ongoing evolution.

5. Building an Arts Hub for Innovation and Collaboration

The model prototype entity serves as a hub for innovation and collaboration, where various stakeholders — including artists, funders, policymakers, and the broader community — can come together to drive creative solutions. By supporting cross-sector collaboration and ensuring coherence in the implementation of initiatives, the organization will play a catalytic role in fostering a dynamic and sustainable arts ecosystem. This hub will act as an incubator for new ideas, partnerships, and opportunities, reinforcing the sector's ability to adapt and grow.

6. Economic and Cultural Impact

A more efficient, unified organization can better support initiatives that drive urban revitalization, tourism, and economic growth, creating a lasting, positive impact on both the city's cultural landscape and its broader economy.

Human-Centered Design In Action - The Merger Design Process

	UNDERSTAND	DEFINE	IDEATE	PROTOTYPE	MODEL
OAC-ANO	Project Charter Board and Staff Change Readiness, Workshops and Assessment Financial and Legal Review	Staff Theory of Change Workshop	Staff and Board Co-Creation Lab 1 Merger Design Canvas	Staff and Board Co-Creation Lab 2 Financial, Governance HR Model	**MERGER MODEL** • Financial • Legal • Governance • HR • IDEA Protocols
COMMUNITY	Community Survey Community Conversation Series Funder Interviews	Community Survey and Conversations Analysis Report	Community Co-Creation Lab 1	Community Co-Creation Lab 2 Program and Service Priorities	

The merger design process followed the steps of HCD: Understand, Define, Ideate, Prototype, and Model.

Our methodology is deeply rooted in the principles of reciprocity and co-design.

1. Understanding the Community

The foundation of HCD is a deep understanding of the users. For this process, we defined users as our community of local Ottawa artists, arts organizations, and cultural community interest-holders. Through extensive research and engagement, we gathered insights into their needs, challenges, and aspirations. This phase was essential to rooting the design process in the lived experiences of the community we aim to serve, ensuring the merged organization will reflect their realities.

June 2023 - We began redefining the merger process by revisiting its original structure and determining the best steps forward.

Board Governance and Staff Readiness Sessions July-August 2023

Shifting the direction in May 2023 into the merger design process not only accelerated the process, but raised many questions from the board on their role and duties in the process. Evoke facilitated two Governance Assessment Workshops for Board of Directors and two for Staff (excluding Executive Directors) as an opportunity to discuss any shared concerns anonymously, and support readiness in the process.

Announcement and Survey - October 2023

On October 30, 2023 we made a formal announcement about the merger.

Horrible Indifferent
Buoyant Smart Uncertainty
Logical Optimistic good Harmony
Nonplussed Ideal
Impressed Anxious Hopeful!! Change
Unsure Timely Fantastic Intrigued Accepting
Fine Opportunity
Expectation Great Excited Skeptical
Relieved Great! Curious
Ambivalent Good Hopeful Interested
Negatively idea Empowering Galvanize
Supportive Sounds Inevitable
Uncertain Uninformed
Unimpressed

We conducted a survey in the fall of 2023 to capture the reaction and community's temperature in response to the merger announcement. The survey also asked questions about what the community currently sees as value within both organizations, what should we keep, consider or leave behind.

Describe in a one-word answer how you are feeling about the joining of these two organizations

The comments touched on themes of community revitalization, excitement for the merger, individual inquiries, and suggestions for improvement. There was a noticeable emphasis on the need for transparency, collaboration, and streamlined efforts to propel Ottawa's arts community forward.

2. Defining the Problem

Based on the insights gathered, we defined the core challenge: How can we design an arts service organization that not only benefits Ottawa's artists and cultural organizations but also enhances the broader community? This question guided our approach, ensuring we remained focused on creating a solution that truly addressed community needs.

Community Conversation Series - November 2023 - March 2024

We took the opportunity to align the work of community consultations and shared learning for the arts sector. We engaged "Thought Leaders" in systems change, and hosted a learning Community Conversation series that was open to arts leaders across Canada.

The presentations shared insights, explored innovative ideas, transformative strategies, and visionary perspectives to spark thinking and our collective work in the arts. Each presentation was followed by a facilitated workshop, led by Evoke and Associates, that encouraged participants to take their learnings from the session and workshop what innovative ideas and new systems of working could be adopted by the new organization.

Taking an approach centred around communal knowledge sharing complemented the findings shared from community members in previous engagement sessions, notably the importance of transparency and community participation. The sessions also acted as an

additional entry point for the public to contribute their perspectives. This allowed us to remain accountable and foster shared learning. To address barriers for participation, attendees were offered financial stipends at all seven sessions.

A summary report of the session outline and the community workshop outcomes were shared publicly following each session. This ensured that those who were unable to participate were kept informed and could continue to contribute. This was complimented by our overall communications strategy, detailed later.

The first five sessions were presented between November 27 and December 6, 2023, in English, and in a hybrid format. The next two were presented in March 2024, in French, online.

Adapting to Change: Innovative Models with Owais Lightwala: Owais Lightwala led an interactive presentation and workshop on Design Thinking methodology. He described it as, "Design thinking is a problem solving approach that emphasizes user understanding, creative ideation, and iterative testing, and the goal of it is basically to solve problems that people have in the real world. Really responding to the need for more user centric human centered design approaches."

Key takeaway: introduced the methodology that we are applying to the merger design process, and provided introductory training on its core elements.

Adapting to Change: Innovative Models with Rudy Ruttimann, FLIP Foundation: Rudy Ruttimann presentation on the [Berkana Institute's Two Loop Model](#) is a narrative about how large systems can transform and create a sustainable new system. The Two Loops model is a valuable tool for addressing challenges and opportunities in the arts sector. It provides a fresh perspective on funding strategies and field building for transitions.

Key takeaway: Take a mindful approach to addressing emergent systems and the transition between old and new paradigms within the arts and culture sector.

Empowering Voices: Indigenous Relations and Self-Determination in the Arts

Presenters Terry-lynn Brennan, J.P. Longboat and Alex Glass delved into the crucial intersection of Indigenous relations and self-determination in the context of arts organizational development. They spoke to the process and development of their collaborative project, the Indigenous Creative Spaces Project (ICSP) with Arts Build Ontario that began in 2019. "*The goal of prioritizing Indigenous self-determination in cultural spaces across, what we now call, Ontario. The foundation of this project has always been to support Indigenous-led arts spaces, stepping away from Western artistic paradigms that predicate the design, operation, and governance of arts and heritage spaces, and make way for Indigenous autonomy and connection with the land.*"

Key takeaways: Throughout the discussion on fostering Indigenous self-determination and meaningful collaboration, several key principles and strategies emerged. The focus is on respecting cultural autonomy, building alliances through allyship, and transitioning from transactional to relational engagement by deconstructing barriers for more

meaningful and sustainable collaborations. By adopting these principles, it is possible to contribute to the empowerment and flourishing of Indigenous communities while fostering mutual understanding and respect.

Adapting to Change: Innovative Models with Tatiana Fraser

Tatiana Fraser presented the significance of Scaling Deep as a complementary approach to achieving enduring impact alongside other scaling strategies. Scaling Deep involves deep personal and cultural transformation to create lasting and sustainable change. It delves into inner work, community connections, and narrative exploration, demanding time, introspection, and personal growth while challenging biases and assumptions. Rooting in context, it recognizes and works with power dynamics.

Key takeaways: the takeaways collectively highlight the integration of personal experiences, collective empowerment, gradual transitions, relational aspects, metaphorical thinking, and a holistic approach in fostering positive change in the context of arts and culture.

The participants emphasized the need for a comprehensive systems change strategy and highlighted the role an organization can play in supporting artists to thrive.

Building an Inclusive Arts Ecosystem

The presentation by Carla Stephenson (Rural Arts Inclusion Lab), Sharif Mahdy (Students Commission of Canada) and Sharon Nyangweso (QuakeLab) addressed the imperative of creating an inclusive arts environment, emphasizing the need for an organizational model that reflects and serves diverse voices within the community.

If we aren't shifting power then what is the point! -session participant

Key takeaways: The recommendations collectively focus on building trust, fostering inclusivity, purposeful data collection, embracing collaboration, and centering artists and communities. Implementing the actions generated in the can contribute to a more equitable and sustainable arts ecosystem.

Centering Artists' Voices | Mise en avant des voix d'artistes

A discussion with Benoit Roy, General Manager of Théâtre Action, and Anik Bouvrette, Artistic Director and Choreographer of Tara Luz Danse, aimed at highlighting the vital role of artists in the merger between the Ottawa Arts Network and the Ottawa Arts Council, promoting intentional inclusion of perspectives, needs, and contributions of artists. The discussion aims to facilitate dialogue, share ideas, and explore strategies for collaborative co-creation, fostering a sense of ownership and community involvement at all stages of the merger. Ultimately, the goal is to inspire ongoing collaboration and ensure that the merged organization is artist-centered and reflects the diversity of the artistic community it serves.

Key takeaways: Artists often face many challenges such as limited funding, and not having enough time to create. However, amidst these obstacles lie opportunities for the new organization to embrace bilingualism, engage with communities, and advocate for policies that empower artists. The following key takeaways and recommendations could foster a more vibrant and supportive artistic ecosystem, enhancing opportunities for artistic expression and cultural enrichment.

Navigating the future of human resources in the arts sector: Strategies for addressing post-pandemic challenges in the workplace

The panelists, leaders in the cultural sector, Marie-Christine Morin, General Manager of the Fédération culturelle canadienne-française, Frédéric Julien, Research and Development Director at CAPACOA, and Grégoire Gagnon, shared their experiences during the pandemic. They explored workplace challenges, post-pandemic success strategies in human resources, lessons learned, and strategies to increase employee engagement in the future.

Key takeaways: The examples shared during the panel demonstrate the power of certain approaches used during the pandemic that engaged team members and produced results through trust, good communication, innovation, and resilience.

3. Creative Ideation

With a clear understanding of the problem, we entered the ideation phase. This involved generating a wide range of creative solutions, encouraging open brainstorming and innovative thinking. The process allowed us **to explore new possibilities and move beyond traditional models of service delivery and governance, while ensuring that diverse perspectives were included in the conversation**.

A 'Merger Design Canvas' was set up to create a framework for how to organize the information and feedback gathered to date. Survey and workshop feedback was mapped to the Merger Design Canvas in two workshops, first by Staff and Board of Directors in a feedback session and workshop (January 2024), and then by Community Members in the Co-Creation Labs (March 2024).

The core elements were: Purpose, Values, Guiding Principles, Rules and Norms (Protocols), Decision-Making (Governance), and Community Priorities.

Merger Design Canvas

Purpose	Values	Guiding Principles
Rules and Norms (Protocols)	Decision-Making (Governance)	Community Priorities

EVOKE CULTURE 2.0

Artists at the Centre - Commissioning Melanie Yugo

Melanie Yugo was commissioned to create artwork that captured her perspectives of this process, from the community conversations and co-creation sessions. The work is a reflection of the grassroots approach to the merger process. Aptly named *Nurture Future*, the inspiration for the commission are the voices of the community.
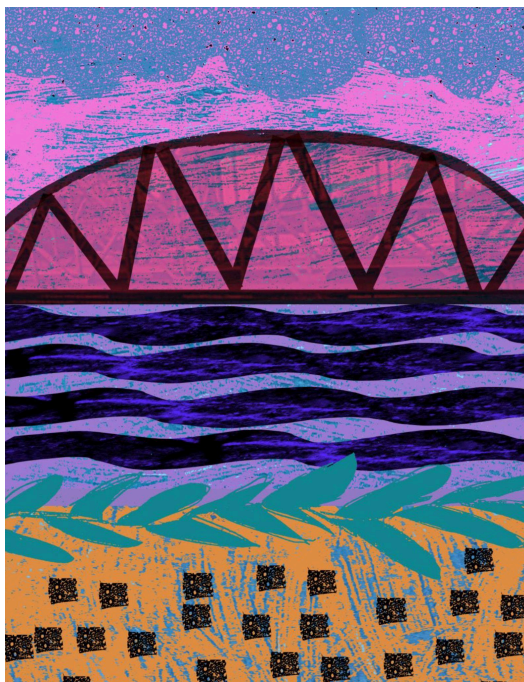
The artwork will act as a source of inspiration for the design and brand development for the new organization.

"*What resonated with me during the Community Conversations in particular is the need to build bridges across regions, disciplines and backgrounds. There is also a desire to take a holistic approach to the arts, recognizing our role as actors in society and in the environment. As artists, each of us are planting seeds with the hopes of creating a sustainable, vibrant, diverse arts sector in Ottawa-Gatineau, one that is grounded in care, community and creativity.*" - Melanie Yugo. researcher, artist and educator.

Co-Creation Labs - March 2024

The community joined us in an interactive co-creation lab exercise in sharing a vision for what they saw in the organization's future.

Participants from the community were invited to join one of the two labs to contribute their expertise and insights, and to co-create a professional and sustainable framework for the merged organization.

The goals of the Community Co-Creation Lab were to:
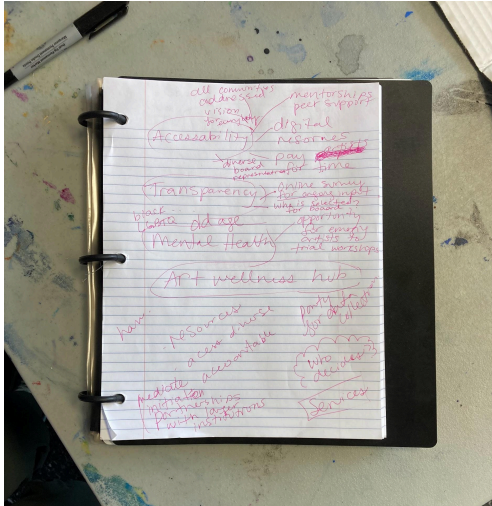
1. Harness Collective Insights: Participants co-create the foundational elements of the newly merged organization, contributing to shaping a comprehensive and inclusive vision for the collective future.

2. Build on Survey Results and Conversations: Build upon the findings and takeaways of the Community Survey and Community Conversations, ensuring they serve as the cornerstone for the merger.

3. Map Priorities on the Merger Design Canvas: Utilize the Merger Design Canvas to map priorities: Purpose, Values, Guiding Principles, Rules and Norms (Protocols), Decision-Making, Governance, and Community Priorities. This structured approach will help articulate a well-defined framework for the merged entity.

4. Focus on Key Categories: Delve into critical aspects such as purpose, values, guiding principles, rules, and norms. Collectively design a robust decision-making and governance structure that aligns with community priorities.
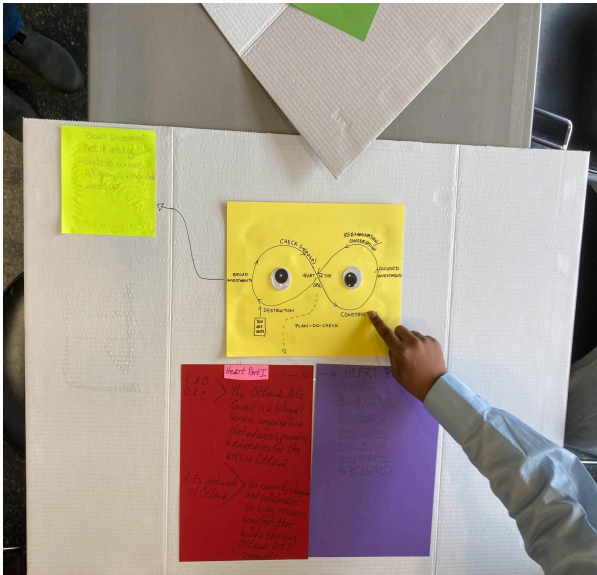
Prototyping Activity

Participants were then separated into small groups for a prototyping activity. Each group was given a prototyping kit that included presentation boards and creative tools. The instruction was to create a prototype of a new organizational model, considering everything they had reviewed and added to in the previous activity.

The Problem Statement: *"How might we...effectively merge two organizations into an equitable, innovative, organization that addresses the evolving needs of Ottawa's art sector, particularly in the context of pandemic recovery, while ensuring sustainable support?"*

Each group then presented their prototype to the larger group, and gathered feedback using a Feedback Grid, asking the following questions: 1. What did you like? 2.

What would you improve? 3. What questions do you have? 4. What new ideas do you have?

The co-creation labs resulted in 8 prototype models for the merged organization. Each was unique, and dug deep into different areas of focus. Common themes were shared decision making, transparency, community care and keeping artists at the center.

4. Prototyping and Testing

With ideas generated through the Co-Creation Labs, we developed a prototype of a potential model. These prototypes were then tested with community members, enabling us to gather feedback and refine our approach.

This iterative process of prototyping and testing will be ongoing throughout the implementation. An iterative process ensures that the work is closely aligned with the community's needs and expectations.

Two public events shaped the first round of testing, the Arts Leaders' Breakfast and the Annual General Meetings.

Arts Leaders' Breakfast - June 2024

We held a breakfast session with 85 arts leaders to test the prototype for a new merged arts service organization. Using an online facilitation platform (Mentimeter) and a feedback grid, participants provided feedback and questions anonymously and were able see the collective results in real-time.

The model is presented in the next section.

This consolidated analysis provides a clear understanding of why participants favored the new model, highlighting its strengths and potential for positive impact on the community and the arts sector.

Participants were asked, "What will be different in your work if this model is a success?" The changes they envisioned through the success of the model and our services can be put in the following impacts:

- Financial Sustainability and Support: We would achieve financial sustainability for the sector through consistent local funding and diversified income sources.
- Advocacy and Visibility: Advocacy efforts would be strengthened to secure more funding and support, ensuring that the arts sector is prominently represented and heard at all levels of government.
- Professional Development and Resources: Professional development opportunities and resources would support the growth and success of artists and

arts workers, ensuring they can earn a living wage and pursue their careers sustainably.

- Equity and Representation: Diverse leadership and equitable representation within the arts community would be more visible, actively supporting IBPOC, newcomer artists, and traditionally excluded groups.
- Collaboration and Partnerships: Stronger collaborations and partnerships would be cultivated between arts and non-arts organizations, fostering new alliances and projects that benefit the broader community.

Annual General Meetings - June 2024

The merger process was formally approved by both organizations at their respective Annual General Meetings on June 26, 2024.

5. Model and Ongoing Refinement

The development of the new organization is an ongoing process. We will continue to shape its governance and service models, with iterative testing and refining that keeps community feedback and co-creation central.

This approach keeps us adaptive and responsive, so we can remain aligned with the evolving needs of Ottawa's arts community.

In early 2025 we will operationally become one organization. Detailed next steps will be defined and guided by feedback and participation of the model the sector.

Model Prototype - Arts Ottawa Testing Collective Leadership

Prototype Model

Arts Ottawa's Core Purpose: to drive collective action in responding to community needs and priorities, fostering a thriving arts sector.

Core goals: collective action, systems change, and community-driven leadership.

The proposed model framework is a mindset shift, and it will take time to transition our organization, core interest holders and the sector into cultivating a mindset of shared ownership and collective responsibility for achieving shared objectives. It shifts the structure to align with the principles of collaboration, autonomy, and shared purpose. It requires moving the relationship between the arts service organization and the arts community from transactional to relational. Because this work is iterative, feedback and involvement from the community will continue throughout.

At the core of this new model is the belief in collective action as the pathway to innovation and solutions for the complex challenges facing the arts sector today. The model is designed around five parts. Each with pathways for shared leadership with the sector, and branches of mobilization and participation. Each interconnect, and have a role in collective action.

Key Impacts of the New Model:

- Shift from Centralized to Distributed Decision-Making

- Inclusivity and Participation

- Flexibility and Adaptability

Community Advisory Circle

The *Community Advisory Circle* will represent our community at large and is a key link between the model and the broad arts sector. In an advisory capacity, it could offer recommendations on relevant issues, helping to inform decision-making and ensure alignment with the evolving needs of the arts sector.

The *Advisory Circle* will ensure that the arts sector voices are heard and have clear pathways to participation and mobilization within the other four 'nodes.' The *Advisory Circle* could be the place for more specialized expertise and guidance on specific areas of focus.

Participation and role: through membership, participation at events like community forums, specific calls for expertise or feedback, etc.

The people: arts practitioners, arts organizations, community leaders, and business and philanthropic leaders.

Core Leadership Circle

The *Core Leadership Circle* will act as a high-level activator in the community. A group of individuals and organizations will be formed to help advocate for the outcomes identified during the *Action Labs.* The *Core Leadership Circle* will also serve as a connection between the 'organization hub' and the 'arts sector' - This is where action will be mobilized and organized.

They are individuals who will collectively guide the strategic direction and overall vision of collective action within our new organization.

Participation and role: through a time-set term, with regular meetings and reporting.

- Sets the strategic direction, priorities, and guiding initiatives for collective action
- Focus on high-level planning, that the activities align with community needs and sector goals
- Facilitates collaboration and coordination across model
- Represents the interests of the Advisory Circle
- Champion 'collective action' with community, donors, and partners, and spread the word about what this collective action is achieving

The people: representatives from across the model : *Action Labs, Community Advisory Circle*, board members, staff and external advisors.

Through open dialogue, consensus-building, and collective decision-making, the Core Leadership Circle will ensure that the organization remains responsive, innovative, and deeply connected to its community.

Board of Directors

The *Board of Directors* maintains its fiduciary role for the corporation and ensures the outcomes from the collective action aligns with the strategic direction of the organization.

Key roles

- Provides oversight, accountability and monitors organizational performance.
- Sets policies, approves budgets, and monitors organizational performance to ensure alignment with the mission and values.
- Ensures the organization's mission, vision, and values are upheld
- Represents the new organization with the Core Leadership Circle and with external stakeholders,
- Advocates for the organization's mission and impact.

People: volunteers from the Ottawa community.

Merged Organization - Operational Hub

The *Operation Hub* (the Organization) is designed to fuel the work driving the change, facilitate coordination and help to make sure that everything runs smoothly. It will host a learning and development hub - where the sector can connect, providing skill-building, learning and mentorship.

The new organization will act as a catalyst for innovation, fostering partnerships, and ensuring coherence in the implementation of initiatives without centralizing power or decision-making.

Key roles

- Provide operational and strategic support to the Core Leadership Circle and Action Labs
- Offer administrative, communications and resource coordination
- Facilitate shared decision-making implementation
- Ensure smooth implementation of initiatives and priorities identified by Core Leadership Circle and Action Labs
- Develop and implement programming that moves the action lab priorities forward
- Develop and manage learning programs and projects
- Serve as a central point of contact for communication and collaboration between different stakeholders.

People: Full-time and part-time staff, contractors.

Action Labs

In the new model, *Action Labs* will really drive change, focusing on pressing needs to advance the sector via the *Community Advisory Circle* (the Community). Depending on the issue, they can function like think tanks, research, policy/advocacy hubs, committees, collectives, etc.

Outcomes from the *Action Labs* are directed to two nodes: 1) *the Organization*, to coordinate the activation and 2) the *Core Leadership Circle,* to amplify the issue and influence change.

People: *Action Labs* memberships are fluid based on the issue of focus for that lab.

Form and Focus Areas: Action Labs form and disband based on the organization's shifting priorities and the community's needs.

Time and Investment:

- Project-Based Labs: For addressing specific goals, like organizing a campaign, launching an initiative. They have clear starts and ends, disbanding after goals are met or when the project is completed
- Issue-Based Labs: For tackling ongoing issues or policy changes. The timelines might be longer, but are reviewed and evaluated regularly to determine if they are still needed and effective.

Review and Assessment: Evaluations will be done to assess the progress towards goals, if the issues still matter, and if the team's strategies are working. Regular check-ins and assessments will help decide whether to continue, change, or disband the action lab.

Rotating Membership: Memberships on Action Labs may rotate to keep fostering fresh perspectives, and help prevent burnout. Length of someone's participation in the lab, and the group's term of reference will be set out and depend largely on the lab's focus. This can help to bring new energy and ideas to the group.

Rotation also helps spread out the leadership and responsibilities, avoiding centralizing decision-making and enabling the distribution of expertise, keeping things fair and inclusive.

Succession Planning: Before membership rotation, knowledge and skills will be transferred between members. This helps with continuity, and fosters mentorship in the sector.

Disbandment: When an Action Lab would end.

1. Achieving Objectives: Once goals or targets are met, successes are celebrated, learnings are documented and shared, the lab would come to an end.
2. Change in Direction: If focus or priorities shift, or the problem they were tackling are not relevant to the sector. Resources can then be put to more urgent issues.
3. Lack of Impact or Feasibility: If it turns out, through evaluation or feedback, the lab's efforts are not really making progress, or are no longer feasible. This could be from forces outside their control changed or they hit some roadblocks.

Transition and Morphing into New Initiatives: Sometimes, an Action Lab will lay the foundation for a new initiative. The original lab might disband and some members transition to a new lab with a revised focus.

Dynamic Action Labs will keep the new organization and the sector nimble and ready to tackle both urgent projects and deeper issues. This can be a good approach in the arts, where issues and opportunities are always shifting.

Appendix 1 outlines how an issue would progress through an action lab.

New Governance Structure - Collective Leadership

Effective governance is at the heart of successful organizational transformation.

A collective leadership approach ensures that artists, arts organizations, and community members are not just participants but leaders in shaping the organization.

Key Elements of the New Governance Structure:

Decentralized Decision-Making: Decision-making power is distributed across multiple stakeholders rather than being concentrated in a few leadership positions. Building on Human-centered design principles, this allows individuals and groups to make decisions that align with their expertise and responsibilities. This system creates greater agility, reduces bottlenecks, and empowers those closest to the issues to make informed decisions.

Inclusive
Inclusivity is embedded in every layer of the organization, ensuring that decisions reflect the full range of perspectives and lived experiences within Ottawa's arts sector.

Transparency
Decision-making processes are clear and accessible to all interest-holders, ensuring that everyone can see how and why decisions are made.

Shared Accountability (Not Authority)
Shared leadership also brings shared accountability. The new governance structure includes mechanisms for accountability at every level of decision-making.

Community-Led Oversight
The governance model includes a community oversight body that ensures ongoing engagement with the broader community and stakeholders. This group serves as a bridge between the leadership of the organization and the community, providing continuous feedback and ensuring that decisions remain aligned with the sector's collective vision.

Impact of the Governance Structure:

- **Diverse Voices**: By decentralizing authority and promoting collective leadership, the governance structure ensures that the voices of artists, community members, and arts organizations are represented at every level.
- **Agility and Innovation**: With decision-making power spread throughout the organization, this model promotes flexibility and rapid responses to emerging challenges and opportunities in the arts sector.
- **Trust**: fosters a culture of trust through **accountability and transparency**, ensuring that stakeholders are consistently informed and involved in key decisions.

Governance Structure in Action:

In this case, the new organization's structure will <u>test</u> a model – rather than setting a permanent structure.

Our approach is to build sustainably and responsively. We will continue to refine the structure through ongoing community engagement and feedback loops. Collective leadership, and the shared accountability that comes with it, allows for continuous reflection and adaptation based on input from governance interest-holders and the community.

We are designing adaptability, allowing for adjustments as the organization grows and as the needs of the Ottawa arts community evolve. The dynamism in the governance structure positions the merged organization as a leader in inclusive governance, capable of responding to both local challenges and broader systemic issues in the arts sector.

Feedback Loops

As the organization grows, the model will continue to evolve based on feedback, learning, and the specific needs of the community, and to ensure its relevance and sustainability.

By embracing this change management approach, we are creating a culture of transparency, decentralized authority, and engagement . A culture whose key priorities are outlined by the community and are continually being aligned with the capacities of the new merged organization.

Operational Considerations

Legal and Operational Considerations

Merger Mechanism

To determine the mechanism that would be used to become one organization, we considered the impact to operating grants, charitable status and tax (HST/GST) implications.

Given the strong relationships and track records that both ANO and OAC have with primary public-funded operating grants, the City of Ottawa Cultural Funding, and Ontario Arts Council, the least risky path was to keep one of the two organization's incorporation numbers. This would maintain the funding history, and potentially secure a stronger starting base operating grant for the merged organization.

It is also a priority to maintain one of the charitable numbers, and by keeping one organization, charitable registration remains.

After consulting with a lawyer and accountants, the most straightforward path was to arrange a donation of assets from one organization to the other.

Annual General Meeting

As member-based organizations, there were key decisions for the members to make to be able to proceed.

- Bylaws were revised for both organizations so that they fully aligned. This provided members of both organizations with the same 'rights.' It also set up the board of directors terms and duties to match.
- Articles of incorporation were approved to be submitted to the charities directorate
- Approval to donate assets to the opposite organization.

Operational Plans

As our prototype model took shape, the Evoke team developed robust financial models and internal operational plans. A financial assessment was developed identifying short-term (transitional) and long-term goals.

To further explore how our organizational capacity could be strengthened, the operational and staffing model for the new prototype explored a re-think of traditional hierarchical positions and titles. Given what we have heard from the community, we considered roles that can cover key areas of coordination, facilitation, support, and program/action lab development. The result ensured that key functions were covered, and the structure supported efficient implementation and coordination. As the organization grows, the roles and number of staff can be scaled up accordingly.

Staff and Board of Directors Role

Risk management and comfort with the unknown

Trust and confidence around a merger took time to build with staff and board. There is a pride felt by people in the organizations, its long history and its impact in the community. The merger design process was a step into the unknown. It required staff and board to engage in a process unlike how we have traditionally embarked on 'strategic planning,' a process that did not center us in decisions, one that centered on artists (members or not).

For the staff, this process required that they live in two worlds, one where their day-to-day responsibilities and duties carried on in the current model, and one where that was still unknown and undefined.

For the board of directors, it required them to accept considerable perception of risk. They had to balance a willingness to experiment and give up some control with their fiduciary duties.

Everyone had to keep one foot in the now, and one foot in the what will be, knowing that what will be coming is being built outside of board and staff control and vision.

The team experience

Common and frequent questions staff fielded were the future for staff's employment, the location of the office, and which organization, or Executive Director, will be left.

The Executive Directors were often warned that could be setting themselves for redundancy (and their teams as well).. But they knew that they would not be truly fulfilling their responsibilities if they did not undertake this work. It was also clear that there was limited opportunity to scale the operations in the future and maintain their staffing levels, if considerable operational changes were not done.

The impact the organizations deliver is driven by the staff and board teams. An important cultural value is respectful and healthy workplaces that lead with care. A natural extension of this is making sure there is a place for everyone through and on the other side of this process.

Despite an overlap of roles and responsibilities among team members, we knew that each team member has a place. (insert wheel/pyramid). The staff worked considerably closer together during the merger process than they had in past collaborations. Working together revealed where individual strengths and capacities were, and was a first 'test' of an HR model. Additionally, shared in-office co-working days allowed for interpersonal relationships to develop, and to learn more about each other's areas of strength and interest.

Moving forward, the two groups are excited about having one larger team from which to learn and draw support from. They have also been feeding off of the excitement and involvement of the community throughout this process.

"I am glad to be at the forefront of this merger between two organizations whose work in the arts scene has been so important. It's been a very fulfilling experience both as an artist and administrator, and I'm excited for what the future brings!" – Axandre Lemours, OAC Staff – Administration and Communications Assistant

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Communicating the Merger and Bringing Art into Our Communications

An important part of the merger has been communicating about the process in a way that is clear, accessible, engaging, and transparent to Ottawa's arts community.

With the support of LeBlanc (& co) Communications., a social impact communications agency experienced in working with the nonprofit sector, we established a communications strategy for the merger. We identified that consistent and clear communications were integral to building and maintaining communities' trust with process, and confidence in the result.

Our communications approach to transparency compliments the communal knowledge-sharing modeled throughout the community conversations and co-creation labs.

Communication tools also acted as an additional entry point for the public to contribute their perspectives. This allowed us to remain accountable and foster shared learning.

Summary reports of each phase were shared publicly. This ensured that those who were unable to participate were kept informed and could continue to contribute.

Our communications approach was to clearly tell the story of the merger by establishing a clear narrative and visual direction: communicate the opportunities to the artists in the community to get involved in the next step; reach people who aren't already in our networks; and communicate our findings from community engagement.

We maintained up-to-date information on our website at each public milestone. We also shared consistent updates across multiple platforms, including our electronic newsletters and social media.

Interest from local media in the process helped to widen the audience, and attracted new people to the co-creation labs who had not previously been aware of or engaged with ANO/OAC.

- CBC All in a Day with Alan Neal - [March 19, 2024: Brainstorming- on the future of arts in Ottawa.](#)
- Ottawa Business Journal - [April 8, 2024: Ottawa's arts community: The merger of Arts Network Ottawa and Ottawa Arts Council](#)

Timeline:

- **2000:** Initial merger discussions for Arts Ottawa East and Council for the Arts in Ottawa
- **2012:** City of Ottawa publishes Renewed Action Plan
- **2019:** Ottawa Cultural Alliance's Cultural Roadmap encourages sector collaboration
- **2020:** COVID-19 Pandemic: Increased collaboration between OAC and ANO
- **2021:** Financial analysis conducted by Brynaert Brennan & Associates
- **2022:** Phased engagement process with local consultants
- **MAY 2023:** Shift in scope to pursue a merger of the two organizations
- **OCTOBER 2023:** Announcement of OAC and ANO Merger and Community Feedback Survey
- **DECEMBER 2023:** Community Conversations
- **MARCH 2024:** Design Thinking Workshops
- **JUNE 2024:** Model Prototype Launch at Arts Leaders' Breakfast and joint AGMs
- **2025:** New Arts Service Organization and organizational model implementation

Showcasing the progress made since the initial announcement, this roadmap was continually updated as we reached new and exciting milestones.

We documented all workshops and public engagement activities, uploading and sharing the comprehensive reports prepared by the Evoke team. To keep our community engaged without overwhelming them, we shared highlights from community conversations and design thinking workshops on social media. Each post provided insights, making it easy for followers to stay informed without needing to read lengthy documents.

Every new announcement referenced both past accomplishments and upcoming initiatives, offering concise rundowns. Finding a balance to help those following along with where we were in the process, and to orient those that were joining in mid-process.

Summary of Key Steps and Considerations

If your organization is considering a merger, there are several important steps to ensure the process is strategic, inclusive, and aligned with your mission and goals.

Here's how we approached it:

1. **Initial Organizational Assessment**
   We assessed the mission, values, and goals of both organizations to ensure alignment. We explored the financial health and stability of each entity, including assets, liabilities, and funding sources.
2. **Stakeholder Engagement**
   One of the most important steps is ensuring the community's voice is at the centre of the merger. We did this through public surveys, community conversation workshops, and co-creation sessions, which informed the development of the operational model. Transparent communication kept stakeholders engaged and informed, fostering trust throughout the process.
3. **Decentralizing Authority**
   We explored creating an operational system that shifts away from traditional hierarchical management. Instead of centralizing authority, we distributed decision-making power more broadly across the arts sector in Ottawa. This approach empowers organizations and leaders at all levels and fosters greater equity, transparency, and participation.

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4. **Operational Prototype and Legal/Financial Compliance**
    We identified any legal, financial, or operational concerns that may arise. It is essential to ensure compliance with regulations governing non-profit organizations, and/or charities. Developing a prototype of the new governance and operational model allows you to test and refine your approach before full implementation.
5. **Readiness Training and Expertise**
    We provided readiness training for staff and board members to ensure they are prepared for the changes ahead. Bringing in consultants who specialize in mergers and community engagement can offer valuable guidance throughout the process.
6. **Securing Project Grants**
    Securing funding is crucial to moving forward with a merger effectively.

A Note From Our Leadership

Through sharing this case study, we hope to tell the 'story' of our merger to cover how we got here, and where we are going, as the Ottawa Arts Council and Arts Network OTtawa merge together to become one organizations. We seek to share learning the learning and insights from this moment in the currently underway merger process.

This case study follows the strategic journey from concept to implementation, documenting the collaborative process.

We are exploring what an amalgamation can accomplish, and are invested in serving as a learning example of how to (re)build a service organization(s) for today's arts sector, in real time.

This document, and our work in general, is rooted both in the histories of our organizations and civic arts policies, and in a longing to embody change. It is important to note that the decision to merge, and to redefine what we mean as 'arts service organizations', is a response to the changing arts sector and *what our organization's place is in it*.

Getting to here has only been possible with the support, and trust built among our community and our sector — including over 550 artists, arts leaders, partners, funders who directly participated in the merger process.

With artists at the core, and a deep commitment to transparency, equity, and innovation, this merger represents a systems-level intervention, this merger represents a systems-level intervention.

Working in co-creation has collectively shaped the vision to build a more responsive, inclusive, and impactful arts organization.

Through this case study, we hope to inspire other organizations to consider similar collaborative approaches. Whether through mergers, strategic partnerships, or other forms of deep collaboration. Systems change offers the potential to create more inclusive, resilient, and impactful organizations that can better serve their communities and address complex challenges in an ever-evolving landscape.

If your organization is considering a merger or transformation, we hope that the steps and process we have outlined support you navigating the complexities of a merger while promoting systemic change.

This approach has fostered a more resilient, innovative, and inclusive organization that is better equipped to serve its mission and community. We hope the same for you.

Cassandra Olsthoorn
Executive Director
Arts Network Ottawa

Nicole Milne
Executive Director
Ottawa Arts Council

Citations and further reading:

1. A Renewed Action Plan for Arts, Heritage and Culture in Ottawa (2013-2018); City of Ottawa; 2012 A_Renewed_Action_Plan_2013-2018_EN.pdf (ottawa.ca)

2. Arm's Length Cultural Sector Development Feasibility Study Final Report, Ottawa Cultural Alliance; 2018 https://ottawaculture.ca/wp-content/uploads/2019/02/OCA-Feasibility-Final-Report-Feb-19_EN.pdf

3. A Liveable City for All: A New Cultural Roadmap for Ottawa 2019-22; Ottawa Cultural Alliance; 2019 Cultural Roadmap – Ottawa Cultural Alliance (ottawaculture.ca)

Appendix 1

Issue Process Example: Human Resource and Labour Market Needs within the Arts Sector

The following is a draft approach to tackle the human resource and labour market needs in the arts sector, focusing on key issues like retention, new and more inclusive leadership, adjusting roles, and fair/living.

Step 1: Defining Objectives and Scope
Core Leadership Group
  ● Clearly lay out what we want to achieve.
  ● Decide what we're focusing on—will it focus on a particular type of arts organization, a specific geographical area, or the sector as a whole?

Step 2: Getting Everyone Involved / Stakeholder Engagement
Operation Hub engages Community Advisory Circle and beings to pull together Action Lab
  ● List some key stakeholders including artists, arts workers, organization leaders, funding bodies, and policy makers.
  ● Develop and implement strategies to gather diverse perspectives and insights.

Step 3: Collecting and Sorting Data
Operation Hub and Action Lab leverages resources for Data
  ● Quantitative Data: Get numbers on wages, how the workforce is changing, employment trends and changes.
  ● Qualitative Data: Gather insights on personal experiences, hear people's stories, what they expect from their jobs, and what's hard about being in charge or changing roles.
  ● Analysis: Analyze this data to identify patterns, challenges, and opportunities that could inform strategic directions.

Step 4: Coming Up with Ideas
Action Lab
  ● Workshops and Brainstorming Sessions: Organize sessions to generate creative solutions to identified challenges. Involve diverse participants to ensure a range of ideas.
  ● Prototype Solutions: Develop prototypes for potential solutions, such as new HR policies, leadership development programs, or innovative funding models that support living wages. Try out some ideas and new collaborations.

Step 5: Testing and Pilot Ideas
Action Lab and Operation Hub
  ● Select Pilot Projects: Pick a few ideas to try out on a small scale and see how they work.

- Gather feedback from all affected stakeholders to assess the impact and reception of the initiatives.

Step 6: Evaluation and Adjustment
Action Lab and Core Leadership Group. Report shared with Community Advisory Circle
- Assess the success of the pilot projects against the objectives set in
- If not, change things up based on what we learned.

Step 7: Scaling and Integration
Operation Hub works to mobilize resources or scale. Action Lab is expanded, disbanded or shifted.
- Plan and implement the successful strategies across the broader sector or targeted areas.
- Work with partners and sector to integrate the successful practices into standard operating procedures and policies.

Step 8: Ongoing Monitoring and Adaptation
Operation Hub regularly monitoring and reporting out.
- Keep watching to see how our changes are working.
- Be ready to change things again if new issues pop up.