Necessary Angel Theatre Company created the following *Project Field Notes* in 2024 as part of their Balancing Act Level UP! Pilot Project.

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Necessary Angel Theatre Company
Pathways to Agreement Pilot
Project Field Notes

The following notes were written by Kristina McNamee, General Manager with Necessary Angel Theatre Company in 2024, after the company completed its Level UP! Project.

Project focus: Developing a Framework of Care and Care Statement for the company, and establishing a Care Fund.

Project inspiration: With 75% of Necessary Angel's staff being parents of young children, the company had already incorporated consideration for caregivers and staff needs into its daily operations and workflow. To build on this foundation, company leadership aimed to clearly articulate its approach to care and extend that support to the artists and arts workers it collaborates with.

Planning and implementation

Necessary Angel joined Balancing Act's Level UP! program in August 2023. Our initial proposal aimed to establish a care program designed primarily for staff and resident artists, that they could access for care needs. 75% of Necessary Angel's staff are parents of young children, and the team also includes a senior citizen.

We began planning the care program but soon our small team (comprised of our General Manager, Artistic Director, and two part-time staff) became very busy with an upcoming production and preparing for the annual audit.

The intention was to have the care program up and running before rehearsals started in September 2023. While discussions with staff and initial steps with contracted artists were underway, it became clear that developing the comprehensive framework we had envisioned was not feasible, largely due to the need to focus on time-sensitive projects.

Instead of a formalized plan, Necessary Angel moved forward with providing care to our

contracted artists and staff through an informal framework. Here are some examples of how this was activated:

- Rehearsals were held in Stratford, Ontario, rather than Toronto where the company is based, to accommodate three of the four company members. Accommodations and travel were covered for the fourth member.
- An alternate rehearsal and tech schedule was created to address childcare needs for company members with children. This included providing alternate days off and shortened rehearsal and tech days.
- Accommodations were provided to company members with chronic conditions, allowing them to participate in the work more fully.
- Responsibilities and working hours were adjusted for staff and arts workers as needed to accommodate medical and caregiving needs.

After the production and audit, our staff team was able to focus on formalizing a process and framework for the care program, which included establishing a Care Fund. In January 2024, Necessary Angel began developing a Framework of Care document. We also wanted to include comprehensive supporting materials, such as HR policies and a manual, which were not previously available.

The Necessary Angel team reviewed frameworks from organizations similar in size to ours and used them as references to develop a framework tailored to our specific needs. We turned to our strategic plan to guide the ethos of our framework, which had been developed in 2020. One of the key goals outlined in the strategic plan is to foster a culture of care where artistic risks can be taken so it aligned closely with this work.

In March 2024, Necessary Angel's Board was updated on the progress of our work with Balancing Act and informed that the Statement of Care was being crafted and would be presented at the next board meeting.

Later in the spring of 2024, we had the time and space to finalize the Framework of Care and draft a Care Statement that aligns with the company's vision and mandate. This included establishing a process for artists, arts workers, and staff to request financial support, and creating a standard operating procedure for the General Manager and Artistic Director to annually review the statement, framework, and budget allocation.

We plan to review the draft documents with staff, consult with an HR consultant, and

present the finalized Statement of Care and Framework of Care to the Board at the May 2024 board meeting. This period also coincides with the return of a staff member from parental leave, who will require additional support related to caregiving, and the hosting of two workshops where the framework can be formally activated.

While we continue to develop the formalized plan, Necessary Angel has already begun negotiations with artists and arts workers for our next production in Winter 2025. These negotiations have been guided by the Framework of Care and Care Fund, which has already received its first request and distribution. Moving forward, we will incorporate the Framework of Care into our onboarding practices for 2024/2025 and beyond.

Key conversations

Necessary Angel's Artistic Director and General Manager lead with a focus on creating a supportive space for the creation of art. Care for artists and arts workers is organically woven into these conversations. When we began preparing for our Fall 2023 production in Summer 2023, discussions about ways to make accommodations and provide financial assistance for care were already taking place. Upon being confirmed as a partner with Balancing Act, we were excited to formalize this approach.

The Artistic Director and General Manager explored how we could support staff and resident artists specifically. These discussions expanded to consider how we might also support the broader group of artists and arts workers we engage with regularly through our mainstage productions and the NA LAB—a platform that offers opportunities for artists to engage in workshops, residencies, commissions, and more.

In Fall 2023, Balancing Act was discussed at a board meeting, specifically regarding the development of the Statement of Care and Framework for Care, and how these initiatives align with our vision, mandate, and strategic plan. The Board was updated again in March 2024 on our progress, and the Care Fund was incorporated into the 2024/2025 budget, demonstrating a clear intention to continue with the program.

In Spring 2024, with the return of staff from parental leave, we look forward to reviewing the Statement of Care and Framework for Care to ensure they best support Necessary Angel's caregivers and our community before presenting them to the Board for review.

Future planning

If there were a "next time," I would try not to get overwhelmed by the idea of perfection and instead focus on simply getting started. Necessary Angel partially achieved this by

continuing and enhancing accommodation practices, expanding methods of care, and initiating meaningful conversations about care with arts workers, staff, and artists.

I found myself repeatedly diverted from developing the framework and statement because I thought we first needed a more robust HR manual or additional HR policies, and a formal onboarding process for artists and arts workers that was yet to be developed.

The turning point came when I reviewed materials from past Level UP! cohorts and realized that the framework could fit the size and scope of our organization. It was better to create a framework suited to our scale than to strive for a perfect standard operating procedure. I also recognized that we didn't need to develop the framework from scratch. The purpose of the cohorts and partnerships was to enable organizations to share resources and processes, allowing us to build upon those resources and adapt them to our needs.

Language considerations

Necessary Angel drew inspiration from the work of past and peer Level UP! cohort members, including Persephone Theatre, Why Not Theatre, and Studio 180 Theatre. We examined how these companies developed their frameworks, the language they used, and why certain elements were included. This led us to ask whether similar language should be included in our own framework and if it aligned with our organizational needs.

The group sessions that Balancing Act hosted where boundaries were discussed were very helpful in moving the process forward. Understanding that the framework provides boundaries for both individuals and the organization allowed for further transparency about our capacity to provide care from a financial and HR perspective. This encouraged internal discussions about the processes and administration required to implement the program effectively.
Ultimately, recognizing that the bones of the framework already existed—in our original application, in our strategic plan, and in the developed programs of other Level UP! cohort members—enabled us to find the language to develop the Framework of Care.

Sustainability

Through the pilot, we realized that making the program very simple to administer, given the limited HR capacity of our organization, would be crucial for keeping it manageable

and sustainable. Seeing how other Level UP! cohorts had addressed questions about insurance, legal matters, and HR issues was incredibly helpful.

Many elements of our framework of care already existed informally in our approach to art-making. The initial funding enabled us to explore how we could incorporate a seasonal fund to sustain a more formalized approach to care for our community.

Advice

Exploratory time with staff, board members, and folks impacted by the program is essential to determine whether it is serving its intended purpose.

Timing the process with the organization's activity schedule is key to ensuring there is enough time to create the program and then activate it. Don't underestimate the time and effort needed in the creation phase.

We also recommend making full use of the resources available from Balancing Act. I wish I had reached out more—and earlier—to fellow cohort members. The group meetings were invaluable and allowed us to see what other companies were doing and helped us move forward when we felt stuck.

Additional thoughts

Many arts leaders must learn an array of skills on the job, often unrelated to any previous education or formal training they may have received. Many companies and individuals do not have enough resources or professional development opportunities, especially in relation to human resources and best practices. The Level UP! program allowed a variety of organizations to learn and participate in building a new best practice to support caregivers in the performing arts.

We are grateful for the opportunity to access and develop this pilot and look forward to receiving feedback from staff, board members, arts workers, and artists as we apply our framework more formally in upcoming workshops and with our next mainstage production in January 2025.