EmcArts

Innovation Lab for the Performing Arts

Case Studies in Innovation and Adaptive Capacity

FEATURING: Center of Creative Arts
PROJECT: COCAbiz

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imprint inc.

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ABOUT EMCARTS

EmcArts works alongside people, organizations and communities as they take on their most complex challenges. Through rigorous workshops, coaching, and labs, we create space and conditions to test innovative strategies and build adaptive cultures. Our practice is deeply influenced by the artistic process, which we believe unlocks entrenched beliefs and opens up new ways of seeing.

www.emcarts.org

ABOUT JAMIE GAMBLE

Jamie Gamble is the Principal of Imprint Consulting Inc., a firm providing professional services in strategy, evaluation and organizational change. Jamie has 15 years of experience in fostering innovation and development in a wide range of public issues including the arts, citizen engagement, education, environmental protection, food security, health and safety, and poverty reduction.

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Foreword

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One cannot discover new lands without first consenting to lose sight of the shore – for a very long time.

— Andre Gide

”

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EmcArts launched its *Innovation Lab for the Arts* to support organizations in incubating innovation projects – conceiving, designing, and testing new strategies to achieve public value. Now, after seven years and 49 participating organizations, we are stepping back to reflect on the longer-term impacts of the *Innovation Lab*, in order to better understand how and where it has had identifiable impact and to appreciate more fully the productive messiness of what adaptive change is actually like in practice.

In 2014, we released the two case studies investigating the journey of Woolly Mammoth Theatre Company and Denver Center Theatre Company's innovations. Woolly Mammoth's *Connectivity* initiative began as a submerged big idea at the heart of the organization and evolved into its current state as a fully integrated strategy across the entire enterprise, while DCTC's *Off-Center*, a disruptive project that started on the periphery of this large organization is now finding its way toward the core. To read the full case studies on Woolly Mammoth and DCTC and learn more about the Lab, click here.

Now, we are pleased to release the next two studies in this series, featuring COCAbiz, a project of the Center of Creative Arts (COCA), which follows in this document, and the *Latino New South* project, which is available here.

COCAbiz is an immersive arts experience that helps business professionals and corporate teams merge techniques from artistic practice into their professional lives. It was initiated by St. Louis, Missouri-based COCA (Center of Creative Arts) in 2009 after their participation in the *Innovation Lab*.

The Lab is a catalyst for an organization's journey in adaptive capacity building, helping that organization question core assumptions, engage in intense planning around a practical innovation project, create a sense of organization-wide investment in change, and test new strategies with the support of change capital grants. *The Lab* provides a framework for making adaptive change across the organization and its community.

We hope these two new in depth case studies will become rich resources for the field because they focus on innovation as a process, one that achieves its effect as leaders negotiate unexpected twists and turns to reinforce their sustained commitment to "next practices."

Richard Evans
President, EmcArts

Snapshot

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The Context

COCA (Center of Creative Arts) is a multidisciplinary arts education organization founded in St. Louis, Missouri in 1986. COCA's award winning educational programming, workshops, performances, and camps are created with the belief that everyone has creative potential, and that the arts can enrich everyone's life. COCA entered EmcArts' Innovation Lab for the Performing Arts in 2009 after launching a successful series where innovative business leaders spoke on linking arts and business concepts. The resulting program, *COCAbiz*, builds on that success through programming that combines the unique strengths of arts education— things like non-linear processes, thinking by doing, vulnerability, and deep questioning—with traditional business strategies.

The Innovation

COCAbiz is an immersive arts experience that helps business professionals and corporate teams merge techniques from artistic practice into their professional lives. The program is comprised of customized trainings, workshops, talks, conferences, and special events that bring professional artists and business leaders together to solve problems in creative and innovative ways.

The Impact

The *Innovation Lab for the Performing Arts* provided COCA with a container for exploring new ideas as well as the space and time to engage them fully. Since developing *COCAbiz*, COCA has learned that their ability to model creativity in a business program has allowed them to expand their impact in critical ways, including:

- **Expanding Relationships and Recognition in St. Louis**
  Creating *COCAbiz* has allowed COCA to make deeper connections in the business community, which in turn has expanded its donor base and exposed a wider cross-section of the community to COCA's programs and activities.

- **Increased Contributed Revenue**
  COCAbiz has had a large financial impact on COCA. *COCAbiz* continued to generate contributed and earned revenue for the organization beyond initial seed funding during the first two years, earning $151,224 in fiscal year 2012, $131,170 in 2013, and $87,000 in the first half of 2014.

- **A New Pathway to COCA's Mission**
  COCA's mission is enriching lives and building community through the arts. COCAbiz builds on this work by expanding its definition of community and audience. By working with local and national business leaders, *COCAbiz* creates rich arts experiences that have relevant meaning and influence.

The Lab

Highlighting variance is a challenging but very powerful tool in the creative process. When COCA learned how to make difference constructive rather than combative, *COCAbiz* became more evocative, credible, and ultimately sustainable. The *Innovation Lab*, a program of EmcArts, was created to assist nonprofit organizations in designing and prototyping new ideas and launching real-life projects that address complex challenges facing their organizations and the arts and culture field at large. COCA emerged from the *Innovation Lab* not only with a solid concept for *COCAbiz*, but also with new insight into their capability for adaptive change.

Case Study: COCAbiz

“

If you want to impart fear in corporate America, invite executives to a training event and then mention dancing.

— Kelly Pollock
Executive Director, COCA

”

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Tom Hillman leaned over to Kelly Pollock and said, "I think I should leave." Tom and Kelly were two members of the Innovation Team representing St. Louis's COCA (Center of Creative Arts) at the five-day Intensive Retreat as part of the EmcArts *Innovation Lab for the Performing Arts*. This was on day three. Tom is a former Board President of COCA, and Kelly, Executive Director, was COCA's General Manager at the time.

> "Going into the Innovation Lab we were still thinking about it as a corporate engagement program. As an arts educator, I wasn't sure that it would have educational integrity. I was there with some reservations."
>
> **— Shawna Flanigan**
> Director of Arts Education, COCA

Kelly pleaded with him to stay. "We all just need to stick with this," she said. Frustrations were running high, and Tom was starting to think that the group would not get anywhere. The Innovation Team was developing their idea for COCA to deliver an arts-based program for the business community. The team had experienced several blow-ups over the first three days of the retreat. Tom wasn't sure the artists understood what a business needed in a workshop. John Parker, a teaching artist in art & design at COCA and another member of COCA's Innovation Team, was frustrated by how the language and process of this planning meeting couldn't incorporate how he worked as an artist. All of the artists on the Innovation Team were wary of what a program like this might mean for the principles of arts education.

Little did they know that one day later they would be sharing the collective high of a breakthrough idea. The entire Innovation Team would be rolling up their sleeves to start working together on the design of something they all agreed was full of potential. They had just come through two of the classic stages of group dynamics as defined by pyschologist Bruce Tuckman : storming and performing .[1] Their idea, called *COCAbiz*, was the result of this group reaching the performing stage, and the *Innovation Lab* was vital to getting there.

COCA is a multidisciplinary arts education organization founded in 1986, and is one of the premier community arts centers in the country. COCA's programs include performances, educational classes, camps, and workshops in dance, theater, art & design and vocal music. Its practice is rooted in the belief that all children and adults have creative potential, and that the arts can enrich everyone's lives. COCA programs serve over 50,000 people annually.

In its 28-year history, the quality and impact of COCA's work has earned the organization a *Coming Up Taller Award* from the President's Committee on Arts & Humanities (now known as the *National Arts and Humanities Youth Program Awards*) a *Bridge Builders Award* from Partners for Livable Communities, selection as one of 19 national sites for a Harvard University research study *The Qualities for Quality: Understanding Excellence in Arts Education*, and a Focus St. Louis *What's Right with the Region!* award.

COCAbiz is an immersive arts experience that helps business professionals and corporate teams to access thinking and techniques from arts practice that they can apply professionally. With *COCAbiz*, COCA introduced a significant new program that required a return to the organization's entrepreneurial spirit, and a push to get creative about what they were offering to a new business audience. How did they navigate the challenges of adaptation in pursuit of this major new program and organizational change? This case explores this question.

THE INNOVATION

Participating in the *Innovation Lab* led to a breakthrough in COCA's thinking about how they might develop an arts-based business training program. The main thrust of *COCAbiz* is a collection of hands-on, immersive workshops that use dance, theater, writing, and art & design to introduce applicable techniques and generate relevant business insights. A teaching artist or a team of artists as well as an organizational development consultant or business strategist leads every *COCAbiz* program.

Prior to the *Innovation Lab*, COCA had started offering a speaker series, bringing in well-recognized presenters, such as Daniel Pink and Chip Conley, who could bridge arts concepts and business. The response was positive, and the organization had become intrigued by the potential of a program geared to business leaders. The breakthrough was the way *COCAbiz* would not only embrace all the elements that make an artistic education process authentic — personal vulnerability, non-linear processes, thinking by doing, and deep questioning — but also employ COCA's artists and teachers. The idea moved beyond presenting a speaker, to a fully immersive, active program. *COCAbiz* has since become an essential and valuable part of COCA's programming.

COCAbiz programs are both open-registration, where anyone from the public can sign up for one- or two-day sessions, and customized, where a workshop is designed specifically for a company and its immediate business issues. COCA also continues to offer innovative business speakers and a bi-annual conference as a way of introducing a business audience to what COCA can do in the more intensive *COCAbiz* programming.

The Innovation: COCAbiz

Arts activity geared toward a business audience is a familiar concept in the arts education field and is something many organizations offer. *COCAbiz* is unique in that it focuses on hands-on learning, using a multidisciplinary approach to program design and teaching methodology. An arts-business practice was entirely new for COCA, and by focusing the practice on multidisciplinary learning, they felt they could offer something uniquely valuable to the St. Louis business community. *COCAbiz* benefits participants on two levels. First, participants acquire techniques and tools that have direct application to situations in the workplace. For example, in the *COCAbiz* program Artful Speaker, participants learn from actors how to score a speech in the way that actors score their script. Scoring a script involves putting notation into text instructing the speaker on tempo, pauses, inflections and other elements that enhance the communication. In Productive Performance Critique participants learn the performance feedback method of "See, Think, Wonder," a process that helps them make non-judgmental observations and interpretations of a situation.

The second benefit is the way that the arts

education experience breaks participants out of their usual thinking patterns. Instead of relying on established mental habits and cognitive shortcuts, the arts force the participants to create from unfamiliar elements. By moving people out of their constructs, new space is opened for creative ideas. Exploring a metaphor, creating a physical representation of a concept, or acting out an issue or new process allow for a creative understanding that helps participants explore new possibilities, access intuition, and imagine how something could be different. These are also engaging experiences that can create something memorable.

> “While COCAbiz was a radical departure from COCA’s focus on children’s programming, it drew upon what COCA already knew how to do, and proposed to bring this to a new audience.”
>
> — **Jamie Gamble**
> Developmental Evaluator

The Innovation Lab

In August 2009, COCA started the *Innovation Lab for the Performing Arts* as part of the program’s 3rd cohort. The Innovation Team included business leaders — an entrepreneur, two corporate executives, a marketing professional — a psychologist, and three artists, one each from the disciplines of dance, theater, and art & design. The team also included three senior staff from COCA: COCA’s General Manager, their Director of Development, and their Director of Arts Education. In selecting who should become a part of the Innovation Team, the choice was made to include strong-willed and passionate individuals who would not hold back in asserting their perspective. The thinking was that if something was created that could satisfy the skeptics from both the business and artistic perspective, then it would have a higher potential for fitting within COCA, and would be something of value for a business audience.

The Innovation team met three times in advance of the Intensive Retreat. These meetings helped the Innovation Team and their EmcArts facilitator, Melissa Dibble, to become more familiar with the issues and to hear why people felt anxious about the idea and the process. Melissa noticed that everyone was saying similar things, for example, ”the workshop must have impact;” however, when they said those things, they often held different assumptions about the meaning and outcome. The business leaders and artists used different

EXAMPLES OF COCABIZ PROGRAMS

WITH FINANCIAL EXECUTIVES

COCA developed a customized program for Wells Fargo to support its C-level executives in getting to a deeper understanding of their recently developed strategy. Some of the executives were concerned that although they agreed on the strategy, a deeper level of consensus and understanding was needed to successfully execute the strategy. Some on the senior executive team initially questioned the necessity of doing this workshop, but as they began to work, the Wells Fargo executives started to see some fundamental gaps in what they had thought was a common understanding. The non-linear approach and deep questioning of an arts experience helped them to break through some of the jargon they had been using in the written plan. The original skeptics came around.

The core activity in the workshop was creating a sculpture with a visual artist that was representative of their strategy. The physical framing of their strategy in a sculpture let them talk with each other about the elements in a way that brought new meaning and insight. The executives were so excited about their creation and the discoveries that they were making that they booked a follow up session to continue sculpting and discussing. In a subsequent workshop, the executives used their finished object and a presentation of their process in creating it to communicate the strategy to 100 Wells Fargo employees. These employees, most of whom were responsible for implementing the strategy, then participated in another COCAbiz customized workshop. They created a giant, physical word cloud that helped them understand their response to the new strategy and how they could carry it forward in the organization.

WITH ARCHITECTS

The architecture firm Arcturis first engaged COCA to develop a custom program because they wanted a fun retreat that could also accomplish some team building. A custom program was developed that started with a collaborative visual arts project, followed by improvisation exercies and then choreography. The increasing discomfort of moving from the visual space into movement started to surface some perspective about the way they had been working together. Some of the senior architects realized that in the push for more efficient internal processes, they had become increasingly distant from some of the fresh ideas of junior staff. The flow of the arts experience was an “a-ha” that they needed to work more openly and iteratively. What started with an interest in having an out-of-the-box retreat ended with providing Arcturis with insight that was essential to their business.

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language to communicate their values, and in these early stages, they were talking past one another.

The artists as well as COCA's Director of Arts Education, Shawna Flanigan, entered the retreat highly doubtful of the corporate engagement idea. They questioned if an arts-business practice could be done with artistic and educational integrity. The Innovation Team members from the business community initially pushed for something that would respond specifically to a single business issue, like talent development. They were skeptical about how artists and their practices would resonate with a business audience. These were different worlds trying to communicate with one another. The artists were resolute in the need to retain the emotional, uncertain, and sometimes-fragile nature of the artistic process. The business leaders were clear in the need for something tangible, marketable, and solution-oriented. As mentioned in the introduction to this case, this divide brought the group to a boiling point on several occasions at the Intensive Retreat. This intense exchange was not a marker of their failure as collaborators; rather, it was an indicator of their success. Their long hours and intense interaction were a function of their commitment to finding a solution that was truly powerful.

It paid off. In taking the deep dive of the Intensive Retreat, this divergent group began to listen to one another. They began to challenge some of their own assumptions about one another and their own thinking. They started to recognize that COCA's corporate program could be built based on COCA's school-based arts integration program, most notably, pairing an arts educator with an organizational development facilitator in the same way that an arts educator and teacher work together. This "a-ha moment" was cemented when the Innovation Team members experienced some arts learning as part of the Intensive Retreat. By participating in some arts experiences as part of the Intensive Retreat, the Innovation Team, and in particular the business leaders, were exposed to the personal vulnerability, non-linear processes, thinking by doing, and deep questioning that these activities invoke. Everyone began to see the power of the arts to open up a group to unique experiences and teachable moments.

This insight immediately shifted everyone's thinking. All of the sudden, the different points of view came together. Shawna Flanigan said, "Once this simple idea came out, the whole thing became very meaningful." The business leaders came to understand how the teaching artists drew upon a well-developed pedagogy and framework. The artists recognized that business people were genuinely seeking something that arts educators knew how to do. They learned that they shared a common interest, just with different ways of thinking and listening to one another. Kathryn Cramer, a COCA Board Member and executive coach noted, "We moved from a fragmented group advocating for our positions to be [a united group] more curious about what one another was saying."

COCA's innovation team came out of the Lab process with:

- A breakthrough idea to model creativity in a business program on the practices and techniques that COCA uses in their arts integration program for schools
- The idea to pair a teaching artist with a business consultant in the delivery of the program
- A commitment to develop curriculum based on artistic learning objectives as well as business outcomes
- Enhanced trust and shared understanding of the language and perspectives of different stakeholders
- A group of board and staff champions committed to the development of this initiative
- Two prototype workshops that included dance, theater and art & design
- The name COCAbiz

The Prototypes

The first two *COCAbiz* prototypes were workshops titled, "Playing the Relational Field: Artistic Strategies for People Managers" and "Re-imagining How Teams Innovate." For each prototype, COCA staff and board members participated in a trial run of a *COCAbiz* program. Different exercises were tried, for example, dance and theater mirroring exercises, where one person mimics the movements of a partner, were used to examine intention and reception in communications. In another experience, participants acted as the "director" of a role-play and improvised choreography as an exploration of thinking intuitively and "on one's feet."

The feedback was positive, and after a couple times with each workshop and some adjustments, COCA felt they could take *COCAbiz* to an external audience. The first opportunity was with 150 financial advisors from Wells Fargo. COCA had a strong relationship with this company, and Wells Fargo was willing to give it a try. Wells Fargo wanted the program to respond to some specific business issues, and so COCA customized a workshop by combining select modules from each of the initial prototypes. It was a nervous moment for COCA. How would these financial advisors react to mirroring, drawing and improvisation? At the end of the session, a Wells Fargo senior executive at the workshop looked to Kelly Pollock and said, "home run." Kelly, thrilled to hear this, wanted to know why. "Because we needed to get out of our heads, and you helped us do that." When the first effort with an outside audience was a success, COCA knew they were really onto something.

COCA continued to experiment. The following workshops built on the lessons from the previous ones, and as confidence grew, new ideas were generated and introduced. Each session included a survey of participants and a debrief session with the artists and business strategists. The surveys collected feedback on the program's goals, quality, design, logistics, and facilities, as well as the suitability of the three modules of the program: dance, theater, and art & design. With each delivery of a *COCAbiz* program, COCA would get a better handle on the key features and characteristics of the program.

The biggest thing COCA had to figure out was how to weave the three disciplines of theater, dance, and art & design into a comprehensive platform for tackling complex business issues. They quickly needed to understand how aesthetic development and exploration could amount to more than simply fun exercises for a retreat. It was important for them to figure out how to sequence a workshop in such a way that activities built off of one another, what disciplines were suited to different situations, and what the boundaries were on how far they could challenge people's comfort zones.

Another thing that COCA was learning was the criteria for an effective teaching artist and business strategist for *COCAbiz*. A business audience demanded a confidence and presence different from that of teaching a youth program, or an adult, skills-based class. They were finding that some teaching artists were really drawn to this environment, and others were not. *COCAbiz* artists and strategists need a strong sense of observation and the ability to call out a moment of learning, without disrupting the flow of the artistic experience. The most powerful moments in *COCAbiz* programs are when the teaching artist can create moments that take group members out of their comfort zones and routine patterns of thinking, and in that; open them to new ways of thinking. The business strategists seize this cue, and can freeze the moment to help the group extract insight, and then unfreeze to continue with the momentum of the experience. COCA was also learning that the business strategists not only needed to be effective in their area of expertise, but they also needed to bring a sincere respect for and a sophisticated understanding of the role of the arts in the program. The most compelling *COCAbiz* experience occurred when the business insights and arts experience built off one another, the result of a collaborative design and mutually responsive facilitation.

> “Our work in change management reveals that team members are more likely to act their way into a new way of thinking rather than think their way into a new way of acting. COCA’s arts-based approach to learning embodies this finding.”
>
> **— Atul Karma**
> Head of Advice, Wells Fargo Advisors and COCA Board Member

BUILDING COMPETENCIES FOR ADAPTIVE CHANGE

Not everyone at COCA was convinced of the merits of a program for the business community. There was disagreement within the board, and Kelly Pollock’s predecessor, COCA’s Executive Director at the time of application into the Innovation Lab, did not think that a business program was the right direction for COCA to take. Teaching artists and arts education are at the core of COCA and its mission. Could a business program be a genuine arts education experience? COCA had worked hard to establish its credibility in the arts community. There was a fear that this new stream of programming would move COCA away from its mission.

While *COCAbiz* was a radical departure from COCA’s focus on children’s programming, it drew upon what COCA already knew how to do and proposed to bring this to a new audience. When COCA decided to move forward, the advice from the board was to do so boldly. They recognized that *COCAbiz* could not grow incrementally, on the margins of the organization. *COCAbiz* demanded they commit resources and focus to a process of intentional innovation. In order to succeed, COCA needed to have strong organizational skills that support adaptation. *The Innovation Lab* helped COCA to identify and strengthen in the following three areas:

1 Diverse Perspectives

Conflict was inevitable with the Innovation Team that COCA brought to the *Innovation Lab* process. In seeking strong-minded artists and business leaders for the Innovation Team, the expectation was that these diverse perspectives would push the boundaries of the idea better. With the range of stakeholder interests in the room, potential issues and pitfalls were present from the start. Rather than avoid conflict, tension was embraced as a vital part of the design process. In reflecting on this choice, Kelly recalls, “Selecting who should come to the *Innovation Lab* was perhaps the most important decision we made. Without the strong ideas from both the artists and business leaders, we wouldn’t have gotten to something

as interesting and compelling." It needed to get messy before it could get good.

The *Innovation Lab* process encourages participants to have a mindset of inquiry. If people enter into the Lab with firm positions, they default to negotiations over those positions — a zero sum game. With inquiry, opposing ideas are explored and understood; since innovation is about creating something new of value, new potential in alternative ways of thinking is opened. With a broader understanding, ideas are more likely to be combined in new and productive ways. Diversity of ideas is not merely a nice thing to aim for — it is the fuel of innovation.

In the *Innovation Lab*, several working assumptions were unearthed and explored:

- That COCA's definition of community could include the business community
- That a program for a business audience could be an authentic arts learning experience
- That an idea originating in the fund development department could be the source for a new arts program
- That teaching artists could execute a quality program for a business audience, and meet both artistic and business definitions of quality

By realizing that the arts offered something unique to business challenges, the business members of the Innovation Team gained insight into how an artist's perspective provided access to a different thinking process, and a shared arts experience could foster a collaborative space for corporate teams. The artists started to see that their passion — genuine arts education — did not need to be diminished in a business environment. Rather than revert to a lowest common denominator, their inquiry helped push divergent views through to a more powerful new combination of different ideas. By embracing the conflict, the Innovation Team was able to co-construct new value. This leads to a much different outcome than negotiated trade-offs where value is reduced. The result is a deeply

> "Selecting who should come to the Innovation Lab was perhaps the most important decision we made. Without the strong ideas from both the artists and business leaders, we wouldn't have gotten to something as interesting and compelling."
>
> **— Kelly Pollock**
> Executive Director, COCA

held new understanding that allows those involved in creating something novel to champion the idea to others, in this case other staff, board members, and potential clients for *COCAbiz*.

2 Comfort with risk

How would this new venture square with COCA's mission of serving the community? What effect would the time and resources directed to *COCAbiz* have on existing programs? *COCAbiz* brought with it risks to COCA's reputation and financial health.

While success could drive additional support and recognition from St. Louis's corporate community, poor *COCAbiz* experiences could negatively affect COCA's brand and community standing. To sell in the corporate training market, COCA had to make declarations about the benefits of their program on workplace communication, collaboration, leadership, and ideation. Their clients expected COCA to deliver on these.

Prototyping was fundamental for COCA to move forward with something risky. They could test the idea first with staff and board members, then with friendly clients with whom they had an existing relationship, and eventually to clients with no prior history. With each iteration, COCA's confidence in the value of the program grew.

The growing confidence let them manage the timing of the necessary investments in the program. The first prototypes were done before any significant up front investment. If the idea wasn't valid, then "no harm done." As the potential was confirmed, the organization increasingly committed resources to marketing materials, staff and consulting time to develop and pilot programs, and dedicated staff resources to manage the program (*COCAbiz* now has a director and a program manager as well as inputs from departments across the organization). Financial risk was further managed by treating *COCAbiz* as a start-up: a revenue generating, service-delivery operation for a business customer operated within a non-profit organization. Early donors were asked to be "angel investors" for *COCAbiz*, and COCA was successful in securing $40,000 to support development activities in 2010, and an additional

> "The workshop embraced the philosophy that there is more value in being an active participant than sitting in a chair listening to someone speak. The sessions brought curiosity to life and challenged us to think differently."
>
> **— Stephen Trammel**
> — Brand Manager,
> Nestle Purina and COCAbiz program participant

$160,000 in 2011. These specific investments in *COCAbiz* were necessary to fund the development work, and to insulate *COCAbiz* from established COCA programs that might otherwise be cannibalized to get *COCAbiz* off the ground.

3 Entrepreneurial Leadership

In the months following the *Innovation Lab*, COCA's long-time Executive Director retired. Over 20 years, she had been highly entrepreneurial and taken the organization from an annual budget of $80,000 to $5 million. *COCAbiz* was to emerge in the midst of a leadership transition. The selection of a successor would drive the direction of the organization, and with that, the extent to which *COCAbiz* was a part of COCA's future.

As the search process got underway, Kelly Pollock, General Manager of COCA at the time, decided to put her name forward. Kelly was an early adopter of the idea of *COCAbiz*, and championed COCA's application to the *Innovation Lab*. After a nation wide search process, Kelly was hired as Executive Director and in doing so, the COCA board was endorsing a path for the organization that included *COCAbiz*. Kelly's leadership and commitment have since been a vital contribution to the development of *COCAbiz*.

COCAbiz required new patterns of interaction between COCA departments. Kelly's leadership style has supported this internal collaboration, expecting and modeling open communication. Kelly has retained a strong hands-on presence with *COCAbiz* by being proactively involved in staffing, programming, and marketing decisions.

Kelly has effectively built shared ownership for the initiative among staff and board members. Her leadership empowered several board members, allowing them to make early connections to *COCAbiz* and become important champions of it. In turn, these early supporters became mentors for Kelly, providing her with a sounding board and coaching. This core group of champions remained highly engaged throughout, and their contribution of much time and energy to developing *COCAbiz* was essential to bringing the board and other stakeholders along.

DEFINING SUCCESS: HOW COCABIZ HAS BENIFITTED COCA

After three years of offering *COCAbiz*, COCA was feeling very confident in its new program. *COCAbiz* had grown from a rough idea to a refined program and a vital element of COCA's overall offering. *COCAbiz* was well received in the community, and the organization was seeing benefits.

As the board and senior management worked through their most recent strategic planning process in 2013, they hit a major stumbling block. *COCAbiz* had not met the ambitious earned revenue goals that the organization had set for itself at the outset. Despite its programmatic success, the sales volume of *COCAbiz* programs had fallen short of expectations. Their strategic planning consultant, and some board members, recommended they cut the program. This recommendation came as a shock to the staff and board members who had championed the *COCAbiz* effort. They remained convinced that the program was a vital part of COCA's future success. *COCAbiz* has seen increased earned revenue with each year of operation. COCA was also strengthening their overall financial position. Within a five-year period, COCA had come from being financially fragile to having sound financial footing, and they were now exploring the possibility of expanding their space due to capacity constraints.

COCA had made a common error. It had slipped into performance mode for something that was still in development. In performance mode, the stakes are higher, and expectations align to these stakes. For *COCAbiz*, this meant that sales and net revenue were defined from the outset as the primary markers of success.

The challenge was that *COCAbiz* was still in a mode of product development and launch. COCA needed the first two years to work out how to deliver this program. At the outset, there was no benchmark for what the pace of growth should be. *COCAbiz* required extra time and inputs for

> “Having worked in the entrepreneurial space for many years, I’m well aware of the need for flexibility, creativity, and innovation when starting a new venture. COCA, using its expertise in the arts, was in the unique position to foster these crucial skills within entrepreneurs, executives, and business leaders of all kinds. COCA’s pioneering risk in creating COCAbiz further solidified our desire to support their efforts.”
>
> **— Tom Hillman**
> St. Louis entrepreneur and COCA Board Member

program design and refinement, which drove up costs. Start-up challenges, such as finding the right person to lead the project as the *COCAbiz* Director, impacted the growth of the program.

COCA realized that the lead times for product development and launch were off. They had over-projected. They recognized that an assessment of success purely based on earned revenue was problematic in the development phase. It was unhelpful in the way it drew attention away from other benefits derived from *COCAbiz*.

Not-for-profits are used to a different financial pattern — secure the money first, then deliver the program. With the up-front investment of time and money necessary to build *COCAbiz*, COCA became impatient in the need for a return on investment. In this moment of crisis, COCA needed to remind itself that *COCAbiz* was still in a start up phase, and that earned revenue would grow incrementally.

A milestone in 2013-14 was a partnership between *COCAbiz* and the John Cook School of Business at St. Louis University (Fall 2013). *COCAbiz* is now incorporated into St. Louis University’s MBA curriculum. This was a very time intensive process that has not yet yielded significant revenue, but has enhanced the positioning and recognition of *COCAbiz* in the community. A major driver of participants is *COCAbiz*’s annual SPARK: Creativity in Business Conference, held in the years 2010-13. The conference is good for exposure, but is time and resource intensive. The decision was made to offer the conference in alternate years starting in 2014.

Rather than cut the program, the board revisited their projections and their definition of success. They realized they had achieved something valuable: proof of concept. Their prototyping had demonstrated that an arts-education experience for business could be done, was useful to business, and could be delivered in a way that is consistent with artist’s expectations for authenticity. In this they realized they needed a more nuanced understanding of how to assess and articulate success in *COCAbiz*. Earned revenue remained vitally important, but it needed to fit within a more comprehensive view. They started to examine

success through several lenses including: How is *COCAbiz* boosting contributed revenue? What are the carry-on benefits of increased legitimacy and recognition in the business community? Does it meet our mission?

1 COCAbiz has widened COCA's relationships and recognition in St. Louis

COCAbiz has helped COCA to better connect with the business community as a means to increase donor support for the organization. Kelly Pollock and the organization's Director of Advancement, Pam Mandelker, frequently engage St. Louis's corporate leaders as part of COCA's fund development efforts. As more organizations experience *COCAbiz*, COCA is able to connect with a broader cross section of employees in more organizations. With this expanded link into the community, more people are aware of the full range of COCA's programming, one factor that has driven recent growth in other COCA programs. Companies such as Nestle Purina, Edward Jones, and Cannon Design have a new or extended connection to COCA through *COCAbiz*. Companies' direct experiences with *COCAbiz* give them a first-hand understanding of COCA and what it can contribute. For businesses that have not yet engaged in a *COCAbiz* program, some are now aware of COCA's role in helping companies develop creativity and leadership skills in their employees. This has garnered new respect and understanding for the organization. Pam Mandelker observed, "Even if they haven't participated, when we talk about how we develop creative skills in the workplace, all of the sudden they look at our organization differently. There is a respect for our ability to be innovative." The business community is beginning to see COCA's relevance to the city in a whole new way. *COCAbiz* is also earning COCA recognition nationally for the innovative extension of what they do, and how they have incorporated a new revenue-generating venture within a not-for-profit model.

2 COCAbiz has increased contributed revenue

The biggest financial impact of *COCAbiz* is on contributed revenue. *COCAbiz* has demonstrated that it can be a catalyst to generate increased enthusiasm and financial commitment from existing sponsors, and be a central part of conversations with prospective donors. One of the earliest signs of how *COCAbiz* could influence sponsorship was when Boeing, an established sponsor, wanted to understand more about what COCA was trying to do with *COCAbiz*. They were intrigued and wanted to support innovation, so in 2010 they directed their sponsorship to *COCAbiz*. This concerned some COCA staff: Would *COCAbiz* steal support from the rest of the organization? The fund development team was confident that it would not. In listening to Boeing, they knew that *COCAbiz* was a good fit and was a chance to strengthen the relationship; and it did. In subsequent years, Boeing has tripled their financial commitment to COCA, and much of that increased support has been directed into the school-based programs Boeing had originally supported.

COCAbiz continued to generate contributed revenue for COCA beyond the initial angel investments of the first two years, earning $151,224 in fiscal year 2012, $131,170 in 2013, and $87,000 in the first half of 2014. Another individual donor made a contribution of $750,000 to COCA in 2012, which included $250,000 of designated support to *COCAbiz* and the balance to COCA's endowment. This direct investment in *COCAbiz* came as a result of the donor's involvement in developing *COCAbiz* as a part of the *Innovation Lab* Team.

In 2012, the Kresge Foundation selected COCA to receive one of its seven facility reserve grants out of a pool of approximately 370 applications. Establishing a facility reserve was part of COCA's overall capitalization strategy. With a facility reserve, COCA can efficiently address needed renovations or repairs, significantly decreasing risks and allowing the organization to focus on growing unrestricted annual support, building its endowment, and developing more risk capital for artistic programming and innovation. The growing earned revenue stream of *COCAbiz* and COCA's plan to increase unrestricted contributions from its new Leadership Circle were key components of its capitalization strategy as well as its case in the Kresge application.

3 COCAbiz is a new pathway to COCA's mission

Many arts organizations fear the demands of "the bottom line" will cause mission drift, forcing them to generate revenue through non-arts activities or services. *COCAbiz* was a shift in thinking about the business of an arts center. *COCAbiz* has changed COCA's perception of target audience and its strategy for engaging them. Rather than seeing the public as potential consumers of the art they want to create, COCA is partnering with the community to create arts experiences that are relevant to audiences' daily life and work.

COCA's mission is "Enriching lives and building community through the arts." The *COCAbiz* program offers the business community a meaningful, arts-based learning experience. In doing this, COCA's mission is relevant to a broader audience. One participant from a large financial services firm commented, "Our team found something personally rewarding in the *COCAbiz* experience. I treasure what I learned about myself and the people I work with." The direct link into the business environment is one more way that COCA can fulfill its commitment to help everyone find and nurture their creativity. For some of COCA's staff and teaching artists this has re-galvanized the excitement and passion they have for their work, and provided a new channel to focus this energy. For example, in the first years of *COCAbiz*, a group of teaching theater artists would meet every Monday afternoon and experiment with ideas for use in *COCAbiz*. They were excited about how their work could be applied, and the fact that they could adapt their craft to have an impact on this new audience, reinforcing the importance of what they do.

Defining success is a common challenge in something innovative. When new ground is broken, there are no established benchmarks. This is not an excuse to be indifferent to progress; it's just that there is no fixed formula for measuring something innovative. In the early stages of something innovative, new understanding about what success could look like has to emerge.

COCAbiz Earned Revenue FY 2009 - Present

Fiscal Year	Earned Revenue	Number of Corporate Client Engagements	Total COCAbiz Participants
2009 - 10	$1,500	1	150
2010 - 11	$54,284	5	500
2011 - 12	$130,135	8	1,602
2012 - 13	$151,224	12	2,000
2013 - 14	$131,170	34	1,200
2014 - 15 (projected)	$175,000	35	1,200

WHAT IS THE CONTRIBUTION OF THE INNOVATION LAB TO COCA?

1 Stronger Abilities for Adaptive Work

The process of taking an innovative idea and developing it into a fully established initiative built COCA's capacity for further adaptive work. The focus of the Innovation Lab's support is to launch a specific innovation; however, the lessons and skills gained have contributed to a longer-term capacity for navigating change at COCA.

2 The Use of Prototyping

In creating *COCAbiz*, COCA has increasingly looked to learning-by-doing as a way to develop new ideas. Kelly Pollock observed that, "Since *COCAbiz*, we have become more confident in our ability to move to action when we don't have all the pieces figured out. We are more inclined to prototype something."

For example, in 2013 they experimented with a new performance model where COCA-produced work of students would be presented alongside professionals and included in shows in their performance series. COCA wanted to see if raising the production values and partnering with local professional artists would showcase the work created with students in a way that would also be valued by its performance series audiences. "It was immediate and risky," Shawna Flanigan said.

One way COCA prototyped this idea was hiring a professional dance company to work with the students to produce an original new dance work. Dancers from the company came early in the fall to teach choreography to COCA's students. In the final performance, the dance company performed pieces from its own repertoire; students from COCA performed pieces that had been choreographed by the company and in the finale, the professional dancers and student dancers performed together. The level of preparation and quality of the performance caused many audience members to have difficulty distinguishing between the students and professional dancers.

Like *COCAbiz*, this new presenting series started challenging assumptions. In this case, it was the way COCA had always kept its organizational focus on learning and education separate from the presenting model. Because of the *COCAbiz* experience, Kelly and Shawna were better equipped to work through the risks and the *Innovation Lab* process provided time and space for the Innovation Team to fully explore their ideas in a productive environment.

3 Stronger Internal Collaboration

From *COCAbiz*, COCA learned to be much more integrated across departments. Fund development's relationships, programming's artistic expertise, and marketing's lens all feed into a successful *COCAbiz*. Prior to *COCAbiz*, these departments largely operated independent of one another. Given that COCA was already working with well-established programs and the existing organizational structures and processes served the organization fine, COCA did not need to fully bridge the creativity of different functions and disciplines. *COCAbiz* demanded cross-boundary interaction, and along with this came increased familiarity and trust. This has become ingrained in COCA's practice. Shawna Flanigan observed, "We interact differently as staff now, [and] to collaborate is normal and it has become part of the culture." What COCA has found is that with a higher level of internal collaboration, the organization's vision and strategy is better known across all functions and disciplines. COCA has been able to advance the organization in meaningful ways with very little turnover, and the result is a greater impact in the community with more programming, more participants, and more community members committed to the organization's success. The result is a stronger case for COCA overall, and a story and brand that more people feel compelled to share.

4 Applying the value of COCAbiz programming internally

The value of the *COCAbiz* model — integrating arts into business challenges and team development — is something that COCA firmly believes in. The board and staff now use the tools and techniques of *COCAbiz* in their work as an organization.

For example, the design of the 2012 board retreat included arts exercises, primarily improvisational theater. Just because board members represent an arts organization does not necessarily mean they are artists. The board is reprentative of the community and includes parents, community volunteers, and corporate executives. They had the same discomfort with hands-on learning in the arts as other *COCAbiz* clients.

The board came away from this experience inspired, energized, and with a new sense of being a team. Past-Chair Cheryl Holman observed, "It was amazing to see how the barriers dropped for board members who had a specific sense of role and place. There was a level of engagement I had not seen with any other board I have been involved with."

Integrating arts-based learning into the work of the board has helped them to be more effective at the board table as well as to be effective ambassadors and advisors for the *COCAbiz* program. It is not uncommon for a Board meeting to include moving and interacting, or to begin with some creative arts exercise. They still accomplish their agenda. The arts complement the experience, heightening engagement, encouraging active listening and openness to new ideas, and building trust. This has also influenced board recruitment. COCA has more recently sought new board members who bring a different thinking style. For example, when COCA recently added an architect to the board, it was because they wanted someone who could think and contribute from a design perspective.

> "We left being fond of each other, and we trusted one another to have a truly important point of view."
>
> **— Dr. Katheryn Cramer**
> Founder and Managing Partner,
> The Cramer Institute and COCA Board Member

WHAT IS THE CONTRIBUTION OF THE INNOVATION LAB TO COCABIZ?

The *Innovation Lab for the Performing Arts* was a vital and unique contribution in the development of *COCAbiz*. Without the *Innovation Lab*, *COCAbiz* would not have been the game-changing idea with which COCA is now working. COCA may have continued to develop an arts and business speaker series, but it is unlikely that it would have developed into the comprehensive program that is now *COCAbiz*.

1 The Lab provided a container for exploring a new idea

Organizations are often challenged to find space to think and reflect on new ideas. The Lab provided the framework for the Innovation Team to fully engage with their ideas for *COCAbiz*. The *Innovation Lab* process provided time and space for the Innovation Team to fully explore their ideas in a productive environment.

2 The Lab set the conditions for storming, then performing

At the start of the *Innovation Lab*, EmcArts encouraged COCA to select Innovation Team members with different opinions. These different perspectives were a powerful combination, and turned out to be a critical element for the success of developing *COCAbiz*. The Intensive Retreat gave sufficient time and facilitation support to effectively wade through the storming process into a highly generative and productive space. The group needed to diverge before it could converge. The *Innovation Lab* created the conditions to push one another's thinking to the point that they achieved a breakthrough idea. By helping the Innovation Team to coalesce around a common understanding, the *Innovation Lab* elevated the idea and enabled COCA to more fully draw upon the their expertise and experience.

3 The Lab built the conditions and strategy for internal support

Several COCA staff and board members were initially unsure of *COCAbiz*. They questioned that the effort to develop an arts-based training program for business might be better directed at expanding youth programming and COCA's pre-professional programs. As the original ideas for doing something involving creativity and business were circulating in COCA, people were interested, but they also had a lot of questions. The recognition that came with acceptance into the Innovation Lab, and the national credibility of EmcArts and the Doris Duke Charitable Foundation gave the idea for *COCAbiz* internal legitimacy. The diverse composition of the Innovation Team positioned a core group that could make the case to various constituencies within the organization. With their tumultuous experience, the Innovation Team became influential advocates, effective in gaining endorsement from other staff and board members and in recruiting early investors for *COCAbiz*. They could better communicate what it was about because they had a first hand experience in how hard it was to fully wrap one's head around this initiative. Support for *COCAbiz* grew as more and more individual board and staff members experienced *COCAbiz*, either as a participant in one of the prototypes, or by hearing testimonials from participating companies.

WHAT DOES THE COCABIZ CASE TELL US?

Contrast, juxtaposition, and tension are instruments of the artist. In the creative process, highlighting difference can be evocative or even poetic. In innovation, difference is a powerful design tool. The container of the Innovation Lab and the non-negotiable elements of careful team composition and off-site intensive, create a carefully modulated learning environment that exploits the benefits of difference. By letting outside voices into the development of an initiative that traditionally might have been the

domain of one part of the organization, COCA built a more robust idea and established the internal and external credibility necessary to sustain the effort. In finding acceptance and appreciation for different perspectives, a new platform for collaboration was born, and people started to really listen to one another. COCA became more effective in productive disagreement and could work through the challening balance of arts and business.

COCA had few resources to risk on innovation, yet it embraced this possibility. Large corporations set aside time and resources for product development, something that not-for-profit organizations are challenged to resource and execute. The Innovation Lab provided the incubator space and support for innovation that allowed COCA to move through the product development phase with increased clarity and momentum. The idea was bolder, better supported, and positioned to attract the necessary capital so that they could move fast enough from concept into action.

Early and rapid experimentation was essential for *COCAbiz*. Innovators are commonly advised to "fail early and fail often." While some people admire the concept, it generally proves much more difficult to do. The Innovation Lab demands that organizations embrace prototyping; COCA got good at it, learning that in adaptive work, doing is more useful than planning for embryonic ideas.

The COCA case also demonstrates is how hard it can be to shift direction once organizations become stable and professionalized. Stability gets its own momentum as the organization becomes known for something and has something to lose such as current subscribers or donors. While a new organization can be inherently entrepreneurial, established organizations will keep pulling back to stability. A sustained effort to remain entrepreneurial is necessary or the organization will slip back into old patterns.

COCA had a big idea. *COCAbiz* was neither a project for the sidelines nor was it an incremental shift. It was a radical repositioning of what COCA is. COCA's experience reminds us that successful innovation can build from core beliefs and competencies. These should not be jettisoned in the pursuit of something novel. They are, in fact, innovation's building blocks. COCA believes that everyone can grow through art, and that arts education should be available everywhere. A program for business is another extension of that idea.

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End Notes

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