



# Flipping the Script:



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A RECOMMENDATIONS REPORT FOR  
REBUILDING AND RESHAPING SHAKESPEARE  
IN ACTION - PART 1

Written by Paulina O'Kieffe-Anthony

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## EXECUTIVE SUMMARY

Past and recent challenges to the status and future of Shakespeare in Action have demonstrated a need for a thorough review and re-assessment of the organization and its operating practices. These events (inequality, lack of diversity, a racist incident, industrial action, lack of accountability, the effects of COVID—19 and most recently calls for more accountability and action with regards to anti-Black and anti-Indigenous racism) have created an opportunity for SIA to re-imagine itself, its mission, structures, goals and future direction.

This report was commissioned to gather internal and external views on Shakespeare in Action, its approach to equity and inclusion, and to assist in aligning its priorities and programming with needs in York South – Weston. The objective of the report is to document these views, interpret them to produce a framework for change, both in the short term and in the long term by articulating immediate and far off goals and to provide a framework for future actions.

The report is a compilation of responses to verbal questions conducted over the period August to November 2020 and summarizes a reflection of feelings, impressions, commentary and suggestions from staff within Shakespeare in Action, from Board members, from artists and contractors who have worked with Shakespeare in Action and from the community at large primarily in and around Weston.

Shakespeare in Action was founded in 1988 by Michael Kelly and for the last 32 years it has sought to “bring Shakespeare to young people across Ontario through innovative programs and critically acclaimed theatre productions.” And while it has most certainly fulfilled its mission in doing so, growing into the company it is today, the company has also developed over time with little internal structure, a lack of accountability, transparency and the necessary structural development to be able to continue to deliver its mission in a way that is reflective to the communities it served - in particular the diverse community of Weston which it now calls its permanent home.

The interviews point to the lack of internal structure and accountability, the inability to reimagine the organization and the compounding effect of a racist incident in November 2019 which started the breakdown of the organization’s reputation and ultimately harmed the brand. Many artists in the theatre community were made to feel unsafe, emotionally hurt and/or traumatized and despite efforts by the Board to address the issue “trust was broken, dignity was broken and there was so little effort to repair that...that for a lot of people made it worse” as noted by a staff member.

Shakespeare in Action has indeed suffered an incredible blow to its reputation, however it seems that the majority of the damage has been confined to the artistic community as opposed to the Weston community we are now a part of.

While this can partly be considered a good thing, the limited level of community blowback is a sign of how disconnected SIA was from the people of York South Weston. The racialized, particularly Black, artistic community have been adversely affected not only by Michael Kelly's actions, but also by the lack of appropriate action from Shakespeare In Action's Board of Directors. Regaining the trust with this community will require significant strategic visioning and a concerted effort from the new creative leadership at SIA.

The first step to ensuring that SIA can successfully move past this incident is to apologize for Michael Kelly's statement and acknowledge the lack of transparency and communication during the process of addressing the incident. Then SIA's task becomes creating a work environment within SIA that is rooted in equitable and diverse policies and practices. SIA will require immense rebranding and reform as it works to separate the organization from its previous Artistic Director and step out on its own with new faces leading the charge.

Secondly the organization requires extensive infrastructure development including the drafting of a comprehensive set of HR policies and procedures, integrating equity, diversity and anti-oppression training within all levels of the organization, ensuring that the organization's leadership (both board and staff) work on developing the internal structure has done the work to convince the larger arts community that it has learned from the incident and has created a more welcoming space.

In summary, the implementation of these high-level recommendations, incorporation of the additional actions listed in this report and a continuation of transparent improvements to the organization should lead to increased confidence in the organization by those affected by it.



## SWOR ANALYSIS

A SWOR analysis is a strategic planning tool that is used to identify an organization's strengths, weaknesses, opportunities and risks and has been used in this report to do so to assess Shakespeare in Action as an initial step in the development of recommendations for change.

### Strengths

- SIA still retains a pretty strong connection with the York South Weston community, including schools and some artist educators despite the incident.
- Michael Kelly's retirement and the subsequent appointment of David Giovanni as Artistic Director has already initiated re engagement by the York South Weston community members, some artists and past staff.
- SIA's increased community engagement activities continue to root the organization into the community through the building of strong partnerships and increasing organizational awareness.
- SIA offers the opportunity for York South Weston residents to have a theatre company that is accessible in their community (as opposed to having to travel downtown to engage in theatre)
- SIA's programming has been able to connect with multiple sides of the York South Weston community (albeit more easily with one side than the other)
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### Weaknesses

- SIA is in immediate need of an HR manual for which to outline the process in these matters. The policies I received demonstrate limited accountability checks which potentially create and foster a toxic organizational culture which was allowed to fester unchecked.
- Lack of full transparency, clear communication and emotional support to staff and artists during the investigation of the incident involving Michael Kelly increased mistrust and organizational disapproval SIA is in needs to address the previous issues within its organizational culture and the board needs to be trained to understand its power in these situations Communications are slightly robotic
- SIA needs to get on video via video message updates and not hide behind the words; get out in public frequently; multiple folks from the organization need to be part of this including Board members and senior leadership SIA needs a much more comprehensive staff and board on boarding process and should create a checklist that includes building online video modules for anti-Oppression, equity and diversity training and a more clear process on chain of command when questions on the job come up.
- Key programs such as Shakespeare and Hip Hop may cause continued issues in how SIA is perceived by the community despite its good intentions to connect to community.

### Opportunities

- The 2019 incident can be used as a catalyst for SIA to open space for dialogue and become a leader in fighting discrimination, in particular anti-Black racism, within the theatre community. Creating a space online to engage the community in blog posts, think pieces, new works can be a great way to re engage the community through mobilization.
- There are opportunities to re engage partnerships, particularly within the schools and community, that would strengthen and stabilize the organization within the York South Weston Community.
- Many artists reported that if SIA made appropriate changes they would re engage with the company.

## Risks

- Michael Kelly's refusal to step down and offer an immediate apology for his comments, and the Board of Directors prolonged process created the perception that the Board of Directors upheld the white supremacist tactic of self-preservation at all costs. These actions contributed greatly to the aforementioned loss of trust. The problem is not whether Michael Kelly meant to cause harm, the problem was that he made racially charged remarks, refused to immediately acknowledge the hurt it caused to the artists and accept the consequences for those actions; this is a sticking point for many in the artistic community.
- To be relevant post-covid we need to attain significant prowess in the online realm. SIA needs to make its website and social media channels much more interactive in order to reach the community or risk losing the ability to program and get funding.

## KEY RECOMMENDATIONS AND NEXT STEPS

### STEP ONE: Complete Rebranding and New 1 year Strategic Plan

Based on internal conversations, a review of the SIA website, company history and internal documents the recommendation is that SIA completely rebrand itself. For 32 years Michael Kelly has been the face of SIA, but a new chapter for SIA is possible including the development of a new organizational culture focused on a safe working environment and deeper community engagement. This is also a chance for SIA to centralize Weston as it shifts the focus of its mission and mandate, planting roots deep into the Weston community exemplifying its deep commitment to working to build the community. SIA's 1 year Strategic plan should focus on really developing the internal infrastructure pieces that will be critical for it to thrive and expand into the future.

#### Activities:

- Potential renaming of the organization
- Development of a clearer mission and mandate centring the Weston Community
- Discuss ideas around what an ideal organizational culture looks like for SIA
- Clarify Program Pillars and build on them focusing on Arts Education, Live Performance & being a Local Creator Incubator; ensure they are connected to new missions and mandate for SIA.
- Updated Branding, Marketing and PR Strategy
- Public and in person acknowledgement of poor handling of the Michael Kelly situation
- Produce more consistent public updates regarding the changes being made at SIA and include funders in these communications.

#### Next Steps:

- Plan a strategic plan retreat - 2-4 days via zoom which includes current board, staff, artists and community partners you feel would be key to this rebranding process.

## **STEP 2: Board Recruitment and Training**

95% of the required change that people most mentioned in the consultation interviews was the creation of a new board, one that was more diverse, representative of and engaged in the Weston community. The recruitment for and development of this board will need to be done carefully and consider many things including language, optics, criteria development for applicants based on the strategic goals of the organization. A thoughtful and comprehensive outreach strategy will need to be developed and postings will need to be strategic, specific, inclusive and accessible in order to attract the right candidates. The board should simultaneously develop its own internal infrastructure to instill confidence in potential candidates. This includes developing subcommittee structures, updating its bylaws, developing new policies and a strong onboarding and training program for new board members.

### **Activities:**

- Use above strategy to inform board roles, define requirements and job descriptions
- Develop targeted outreach strategy
- Develop comprehensive board onboarding and training including Anti-Oppression, Anti-Racism, Equity and Diversity Training
- Develop Board Subcommittees that allow for board, staff and community to participate (Fundraising, HR & Community Outreach should be priority)
- Develop a comprehensive succession plan for current board members to be phased out once new members are settled in

### **Next Steps:**

- Plan a board recruitment committee that includes board members, staff and at least 1 key community member
- Dedicate a board meeting as a working session to develop board subcommittees, job descriptions for each role based on a board support requirements matrix and map out succession planning (this could be supported by a facilitator)
- Make a plan on how to fulfill the Board Development Document

## **STEP 3: Development of an Equity Strategy**

Shakespeare in Action will need to work on the development of a solid equity strategy that will instill confidence back into both the artistic and York South Weston community. This document should guide the organization in areas such as hiring, policy making and HR management. Having a strong equity strategy that can be implemented throughout the organization's infrastructure will ensure that SIA is committed to taking well thought out, direct action in the event of any future issues; it also shows that SIA has taken the opportunity to learn from and respond to the 2019 incident.

### **Activities:**

- Create a standing committee to develop this strategy
- Work with a facilitator to develop the strategy Complete strategy and present for feedback
- Finalize strategy and create a matrix to assess all programs, policies, recruiting, hiring and dismissing against, as well as consequences when policies are breached.

### **Next Steps:**

- Develop a work plan and work with board and staff members - hire a facilitator if possible

#### **STEP 4: Continue to Diversify Staff and Increase Supports**

While SIA has taken steps to diversify its front line staffing team, consultation interviews have indicated that SIA needs to define its responsibilities more clearly when engaging BIPOC to work with the organization. In order to attract staff and guest artists of colour SIA needs to create a safe environment where they can thrive. This will help in staff retention and go a long way in re-establishing the organization's reputation within the arts community. It's not enough to diversify staff without putting in appropriate levels of professional development and financial supports that demonstrates to staff and artists that they are highly valued by the organization; otherwise this could lead to a continued perception of exploitation of artists of colour. SIA should invite BIPOC artists and staff to contribute, at their discretion, to an ongoing internal review process and find ways to include staff contributions to the development of the organization outside of the program development. This type of organizational culture encourages staff to feel safe to speak up about issues, gives them a sense of ownership and thus moves them into a position of being able to sincerely champion the organization.

#### **Activities:**

- Develop a more comprehensive and Supportive Staff Onboarding
- Hire more diverse permanent staff and artists in residence (rep of Weston, Toronto, Canada)
- Do regular staff check ins or make space for feedback loops for staff to feed into new policies, programs, etc
- Increase staff supports, such as covering vulnerable sector checks Increase pay rates for artists
- Create more opportunities for Board and staff to mix - invite staff to be part of the subcommittees

#### **Next Steps:**

- Call an organizational meeting to check in with staff about the follow up to the incident, this consultation process and get direct feedback about future needs.
- Review and revamp your current hiring process to strengthen areas that will result in more local, strategic and equitable hirings.
- Create a work back plan to create a staff training and onboarding process.

### **ADDITIONAL TOOLS & RESOURCES**

In addition to these reports, a workplan along with additional tools and templates have been developed and shared with the SIA Artistic Director and the Board of Directors as a means of expediting the above recommended steps.

### **COMMUNITY BASED RECOMMENDATIONS**

Additional recommendations will be added or used to enhance the above recommendations in part 2 of this report and will come directly from community consultations.





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## A COMMUNITY ANALYSIS

The second part of this report summarizes key recommendations put forth by community members that are currently engaged with SIA or have been engaged with SIA in the past. For the purposes of this report “the community” refers to two community groups; the arts community and the broader York South Weston community.

The arts community in the context of this report is made up of Artist Educators, Cast and Crew involved in SIA past and current productions as well as artists who are part of the larger theatre community.

The York South Weston community includes community partners, community members and local school administrations who work in partnership with SIA.

15 community consultation interviews were held and an additional 15 participants responded to the survey.

Of the participants that were interviewed:

- 37% were Artist Educators
- 34% were Community Partners
- 27% were Production Cast/Crew
- 1% were Teachers at a Local High School
- 1% were Community Members

Of the survey responses received:

- 53.8% were Artist Educators
- 15.4% were Production Cast/Crew
- 15.4% were Teachers at a Local High School
- 7.7% were Community Partners
- 7.7% were members of the Larger Theatre Community

### Community Quote

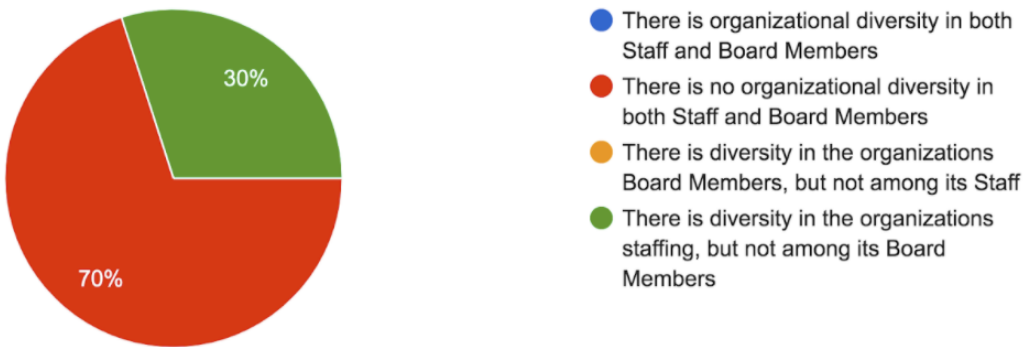
*"This survey, engaging the roster and members of the artistic community, examining the internal functioning of the board and staff, communicating publicly about the incident, being transparent about the steps to be taken and most importantly, the changes I have seen since David took on the Artistic Directorship. I have seen a major increase of BIPOC artist presence both in the shows and who has been hired. I see an engagement in the Weston community, amplifying local voices of young people. I see food donation drives and an ongoing commitment to the teaching roster. What I see through these actions is a commitment to elevating BIPOC artists, educators, youth, and locals to engage with Shakespeare in a much needed and important way. I know these things are happening thanks to SIA's online presence"*

# KEY COMMUNITY FINDINGS

## 1.Increasing Diversity Needs to Be A Top Priority

The lack of diversity at SIA was a consistently made point in almost every community interview that was conducted and certainly was evident within the survey responses. When asked if Shakespeare in Action was diverse, 70% of survey respondents noted that there was no organizational diversity at SIA and 30% said that there was diversity in the staff but not among Board Members. Additionally, many of the comments made in the interviews in response to questions about what key changes SIA was required to make, included a wide variety of responses which focused on increasing diversity, particularly at the staff level, specifically in productions cast and crew (most importantly among directors).

Do you feel that Shakespeare in Action is Diverse?  
10 responses



Key comments from respondents in response to increasing diversity at SIA included:

**“Hire BIPOC artistic leaders (writers, directors, designers). Creating an education program that addresses the colonial history of Shakespeare. Creating co-productions with leading organizations that address marginalized voices”**

**“Support the Bipoc artists in their community.Tell the stories of the people who live in the Weston neighbourhood and engage further in the community.”**

**“This is not relevant to the relationship we have with them at funding level since we welcome all the organizations and don't discriminate. However, their success rate with grants would increase by taking the actions described in the previous question.” (actions described in the previous question relate to increasing diversity at SIA)**

The call for diversity came from both the Weston community and the Arts community, however those who were part of the Weston community noted the increase in diversity in the hiring of staff this past summer.

It is important to note that not many respondents knew much about SIA’s Board Members and whether the Board itself was diverse, however throughout the conversations many assumed that it was not and noted that they didn’t know who Board members were or if they were from the local community or not.

## Key Recommendations Made by Community:

- Continue employing talented BIPOC educators, administrators, production etc.
- Hire strong and focused artistic leadership that has a history of working with more progressive models around equity, diversity and inclusion but also with a new vision for SIA that can inspire the community, the artists and the area it serves
- Commit to hiring a higher percentage of BIPOC actors, crew members, directors, producers, staff, and members of the board.
- Involve paid outside consultants from BIPOC communities for all programming.
- Collaborate with other communities to tell other stories, not just Shakespeare. Bring productions that they are familiar with to make it more diverse.
- Consider the language barriers of some parts of the community.
- Hire Black and Indigenous people in the office to instil a stronger sense of safety and security for BIPOC contracted artists and participants.
- They need to branch out from hiring white cis male directors.
- The people in charge need to be diverse re: org leadership, production leadership, casting
- Diversify the board and when doing so consider age, gender, sexual orientation and race.

**This finding supports Step 4 of my key recommendations in Part 1 of this report.**

## 2.The Right Leadership is Key

In the majority of interviews that were conducted, the message that was continually repeated was that the majority of community members, from both the arts and Weston community, would re engage or work with SIA again due to the change in leadership and their positive relationship with current artistic director, David di Giovanni. Some of the respondents didn't really know Michael Kelly well or at all, and it was those respondents that spoke most highly of Shakespeare in Action. Members of both communities who did know or interacted with Michael Kelly, particularly those who were directly impacted by the incident, did not speak as highly of the organization or its leadership. **58% of survey respondents said they were personally impacted by the incident with Michael Kelly.** One respondent wrote

"I was sitting in on auditions for THE NEGROS ARE CONGREGATING by Natasha Morris at the time of the incident, auditioning Black actors. One of the actors was in that cast with SIA, so he was emotionally affected by it. He had come from that rehearsal....It was clear that even those without direct knowledge of the event wanted to unpack. The entire community was upset, outraged and feeling for the performers who had to endure this, as well as the playwright."



Despite the incident however, the majority of respondents noted that once Michael Kelly left the company and David moved into leadership, that made a huge difference and reactivated interest in parts of the community to work with Shakespeare in Action. One respondent stated, “choosing not to keep Michael on was a good first step. Having David step in was the most logical choice because of his connection with artist educators and teachers,” while another respondent noted that “David is the one constant for me as the one person I have seen through this experience that is holding down the fort in this experience. David is a good person to be leading this.”

In terms of leadership, both communities have acknowledged this first step and conclude that David’s leadership continues to bring about change within SIA that many within the community are looking for. As Shakespeare in Action continues to make strides forward, it is encouraged to continue to identify and hire BIPOC leadership that connects to the community, demonstrates SIA’s commitment to equity and diversity and supports the development of a deeper rooted connection between SIA and both communities.

**This finding supports Step 1 of my key recommendations of Part 1 of this report, specifically as it relates to communicating the new leadership and having that leadership engage with the community via increased and strategic marketing, PR and in person connection.**

### **3.A Public Acknowledgment and Apology**

Despite the initial communication that was put out by SIA following the incident, many of the respondents who were not closely connected with the production side of the organization said they didn’t know what was happening, were given vague communication or learned of the incident through third parties instead of directly from SIA. It was opportune to be able to connect with the former Board chair to understand the in depth process that SIA was undergoing; much of it with potential for major legal ramifications that could potentially shutdown the whole organization and very much explains the length of time and why the process unfolded as it did. However, due to the lack of communication to the public in the form of updates, this opened an information void which was filled with statements by the artists of Sound and Fury and word of mouth discussions within the arts community especially, which ultimately meant SIA was not able to be in control of the narrative. Therefore by the time a statement was put out it was received as lacking urgency and potentially dismissive.

Additionally the lack of background knowledge into the process by the public made it difficult for many to understand why the follow up actions (Michael Kelly’s transition period, his celebratory retirement send off, etc) were decided upon. Many felt that the actions of the Board made them complicit or in line with Michael Kelly’s actions and this further caused damage. As one respondent said,

"I did not feel like SIA dealt with Kelly's actions swiftly and decisively and definitely felt that they were not transparent about the entire situation. The emails I received about the cancellation were very vague and it was not handled well. I only found out the details of the situation through social media of some of the cast members and word of mouth from my friends and colleagues in the theatre community."

When the initial communication was released SIA was in a reactive state, trying to navigate through a very precarious situation it was not prepared for. Now however, the organization has worked to repair its commitment to community, has new leadership in place and through this very consultation has begun to reinstate community confidence; this makes it an opportune time to publicly acknowledge the incident and apologize for how it was handled (as the majority of respondents who were aware of the incident agreed that it was not handled well). As one artist put it, "This incident is pretty grievous and did a lot of damage and it will take time to come back from it." From this report it is clear that SIA's comeback will be easier with the Weston community than with the larger arts, specifically theatre, community as one respondent notes; "beyond the theatre world and Black artists, most people didn't know, so there was generally less blowback than expected. It could have been a whole lot worse."

SIA now though has an opportunity to address the general public and reach out to those to communicate that it acknowledges and takes responsibility for the following:

- Not preparing itself as an organization with systems and policies that would have disallowed for the creation of an organizational culture where one man lead, unquestioned, creating the conditions for the incident to occur.
- Even though the Board absolutely denounced the actions, it was not well trained or equipped at the time and required the time to consult with necessary advisors on next steps
- That the organization recognizes the role its played in breaking trust with those in the Weston and larger arts community but is working on rectifying that through specific actions
- Offer another apology for the hurt caused to anyone impacted, particularly cast and crew members of productions that were cancelled.

As mentioned in part 1 of the report SIA should own this moment in its organization's history and use it as a key learning opportunity to aid in the company's growth and understanding of what it means to create safe spaces to program and produce theatre in Weston. As SIA continues to sincerely embed itself into the community through a number of strategies including board and staff diversity, hiring local artists and engaging both sides of the Weston community in programming, the company will rebuild trust and increase engagement.

**This finding supports Step 1d of my key recommendations of Part 1 of this report.**

#### 4.The SIA Mission and Community Outreach/Engagement

Throughout the survey responses and individual consultations the question as to whether Shakespeare in Actions' mandate and in fact its very name, should be re-thought as it intends to root itself within the culturally diverse community of York South Weston. While the work of Shakespeare can be engaging to those who enjoy it, for others it may hold little to no relevance and thus immediately creates a barrier to engaging the organization overall. One comment in which this was made evident was from a respondent who suggested SIA,

"Perhaps revisit its mandate and focus on Shakespeare. At its core, the mandate is a reflection of white supremacist thinking, since the entirety of the organization is upholding a playwright from the Western canon. In some ways, it is inevitable that this creates problematic structures internally such as having a white director direct this all Black work by default, and then further when that director does not truly understand and acknowledge in the moment that their word choice could not be justified."

As Shakespeare in Action continues to root itself in one of the most culturally diverse communities in the city, it is safe to recommend that the company should at least take the time to reflect on its need to continue to hold onto this specific identity, and explore the option of rebranding itself, name included. Not only would this allow SIA to continue to move from under the shadow of Michael Kelly, but it would give the company an opportunity to expand its mission and showcase stories on stage from culturally diverse writers, led by diverse directors and performed by a diverse cast; all of which might better serve and engage the larger York South Weston Community.

However if SIA is intent on keeping its current name and mission, then it will need to work hard to connect with those in the community for whom Shakespeare bears no relevance, relatability and thus increases reluctance to connect with the organization. One respondent suggested that SIA, "chop Shakespeare up more. We all have our choice edits of Shakespeare to tell it in the shortest ways, but start telling new stories with it. We don't have to just tell Shakespeare or have a basis on his Canon in order to access his universality." If SIA can somehow find balance in this community by developing programming that focuses on elements of Shakespeare but also incorporates culturally diverse plays and playwrights, the possibility of engaging the community at deeper levels and higher numbers is completely possible.

Regardless of the path it chooses, SIA needs to clarify its mission and mandate to the community and engage in programmatic activities that will help to fulfill that mission. As one respondent suggested, SIA should aim to "strategize on what their mission and vision is, to avoid mission drift in a time of crisis as it erodes the organization. They really need to define who their main target is, rebrand themselves accordingly and be very clear on what they are offering to the community." With a clear mission and mandate, it will be easier for community partners to understand how to align themselves with SIA and reconnect to collaborate on community projects and programs.

**This finding supports Step 1a and 1b of my key recommendations of Part 1 of this report**