

**THEATR BRYCHEINIOG
AND THE MANAGEMENT OF THE
BRECON INTERNATIONAL FESTIVAL OF JAZZ**

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Prepared for Brecon Guildhall Theatre Limited
and Brecon International Festival of Jazz Limited

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1. INTRODUCTION

1.1 Background to Brecon International Festival of Jazz and the relationship with the Theatr Brycheiniog

The well-reputed annual Brecon Jazz Festival was founded in 1984 by Tony Elston and was managed successfully by Brecon Jazz Festival Limited (a private company limited by shares and incorporated 1986; later a non-profit company limited by guarantee) until three-years of financial difficulties in 1999, 2000 and 2001 led to a deficit of £85,000. This threatened to close the Festival, for it could no longer survive as a standalone operation with year-round costs for an intensive weekend event. In order to stage the Festivals in August 2002 and August 2003, Theatr Brycheiniog, the town's year-round presenting theatre and arts centre, was approached to manage them. The Board of the Theatre expressed a commitment and loyalty to the arrangements at the outset. The Theatre offered its services for an 'at cost' management contract, and two Festivals were successfully presented during this interregnum. The integration of the Festival into the programme of the Theatre presented challenges: the reconciliation of the functional management of the Theatre with the demanding activity of mounting a large one-off event caused new pressures. Nevertheless, two Festivals were achieved without any disruption to the programming output of the Festival or the Theatre, and despite a strain on Theatre resources it adjusted its management systems to support the Festival. The mixture of two differing organisational 'cultures' worked well.

The temporary partnership between the Festival and the Theatre was endorsed by two key funding partners of both organisations: the Arts Council of Wales and Powys County Council. Indeed, the Arts Council made its Festival subsidy conditional on the good husbandry of the Theatre, and the Theatre Director, Andrew Eagle, acted as Executive Director of the Festival for these two years, whilst the Festival's long-serving Artistic Director, Jed Williams, continued to curate the Festival programme.

The Festival's outsize accumulated debts of £111,000 were written off by a special grant from the Welsh Assembly Government in May 2003, which also offered a sum of £270,000 over three years to a successor Festival non-profit company, Brecon International Festival of Jazz Limited. This was allocated as £90,000 for the 2003 Festival and up to £90,000 for 2004 and 2005. The precise grants for the next two festivals will be determined by the Government on the basis of a grant application and review of need in each year. Their debt settlement grant, and future reviews, was channelled via the Arts Council of Wales. In order to re-establish the Festival on a sounder organisational base with professional full-time management, the Theatre and the funding bodies wish to review this transitional partnership and to investigate a longer-lasting, positive relationship between the Theatr Brycheiniog and the Festival, wherein the Festival will continue to be an autonomous company.

The Festival in 2003 sold 15,699 tickets with sales of £204,218 net of VAT. With other income from sponsorships, catering, grants and programme sales, the turnover reached £450,000 this year. Under the Theatre's management, the Festival made a small net surplus; it has improved the Festival's business and operational aspects remarkably well. The Theatre's management of the Festival represents a near-doubling of turnover; by contrast, the Theatre sells approximately 35,000 tickets

annually. Theatre ticket sales and theatre hires exceeded £220,000 in the year ending 31 March 2003, and with other earned income and revenue grants, its turnover was £524,000. When seen as a combination therefore, the turnover approaches £1 million.

The new name, *Brecon International Festival of Jazz*, reflects four priorities: to promote the exceptional location in a small, idyllic market town; the global and cosmopolitan origins of the artists and many festival-goers; the vibrant world of jazz to be programmed and viewed from many perspectives; and the celebratory nature of the festival as a source of renewal and a break from routine and work, where jazz can be fuelled in a spirit of exploration, adventure and fun.

This document is not the Welsh Assembly Government or Arts Council post-festival review, but may contribute to their appraisal of future management and artistic direction arrangements. Because the partnership developed tactically – the Theatre did not get involved with the Festival as part of any strategic business plan and the Festival might be said to have become associated with the Theatre for precipitous reasons as a last resort – the purpose of this report is to assist the partnership so that, primarily, the Theatre can make the right choices for continuing what may (under certain circumstances) be an effective relationship for renewing the artistic purpose, management and accomplishment of the Festival. And in so doing, it may not only sustain the Festival, but pursue an opportunity to make a well-regarded receiving theatre into a more accomplished promoter.

1.2 Objectives and Brief

The purpose of this study was to advise the Theatr Brycheiniog on a strategy and way forward for both companies to develop artistically and administratively within the evolving framework of perceived company independence and mutual support. Tasks were agreed as follows:

1. To examine the company structures, and to consider the best way to operate (or integrate) the two companies, including:

- Governance options and legal frameworks
- The Boards of Directors
- The Management and Artistic Direction
- The Staffing and remuneration for the two companies
- The Management services provided by the Theatre
- Charitable status

2. The artistic policies of the Brecon International Festival of Jazz:

- Potential and scope for an Education and Community Policy
- Relations with Arts Council of Wales and other funding bodies

3. Financial planning and development

The business of the two companies
Sponsorship issues
Employment issues

4. To provide the following outputs from the study

An action plan to achieve recommendations for future management of Brecon International Festival of Jazz

1.3 Methodology

The study began with a telephone briefing from the Theatre Director and Festival Executive Director, Andrew Eagle, at which timetable and methodology were agreed, written material for the study identified, and lists agreed of individuals to be consulted directly during the study.

The specific steps followed thereafter were as follows:

- Consideration of relevant written material supplied by the theatre; a list of people and material consulted is attached in the Appendices
- Review and analysis of Brecon International Festival of Jazz, including a scrutiny of programmes, financial performance, audiences (details of documents supplied are included in the Bibliography)
- A visit to the 2003 Festival was made between 9 and 11 August: several performances were attended across the town and interviews with key personnel and the Festival Board were undertaken
- The festival's Executive Director, Andrew Eagle and Financial Administrator, Miriam Ward, visited the consultant at Edinburgh on 26 and 27 August
- Several telephone discussions were made with Mr Eagle during September and October
- There was one telephone interview with the Festival's Artistic Director, Jed Williams, on 29 September
- Some comparison of the Brecon Jazz Festival to other festivals managed by theatres and arts centres was made, by use of my research archive and discussions with other theatre managements and festival directors

Given the short period of research, interpretation and drafting, (seven days were allocated to the commission) no public consultation meetings were held, and no questionnaires were circulated. Therefore, some areas of concern may have been omitted.

2. SUMMARY AND RECOMMENDATIONS

2.1 KEY FINDINGS

2.1.1 The strategic context for the Theatre's management of the Festival has an excellent foundation:

1. There is no accumulated Festival deficit for the new Company to inherit
2. Two Festivals managed by the Theatre have been successful
3. The Festival now enjoys a new conceptual base; there is mutual benefit to be derived from the partnership
4. The Theatre management and staff are enthusiastic to make the partnership a successful continuum
5. Relations with two key stakeholders, Welsh Assembly Government and the Arts Council of Wales, are good

But there are challenges:

1. There are no SMART objectives for the Festival (specific, measurable, achievable, relevant, time-bound)
2. There is no Business Plan for the Festival
3. Success in 2004 and beyond hinges on the reappointment or appointment of an Artistic Director, or new programmer arrangements with an Associate Director or artists agency
4. Unexpectedly, Powys County Council withdrew its Festival grant in 2003
5. Festival support from Brecon Town Council is infinitesimal, yet the Festival contributes a lot to the town

2.1.2 The Theatre's monitoring and evaluation of the Festival is effective:

1. The service agreement between the Theatre and Festival companies is adequate
2. Progress statements of income and expenditure, measured against budget, are used appropriately
3. Reconciliation of the annual Festival budgets to actual income and expenditure is easily interpreted
4. The Theatre's financial reporting system is adequate for the Festival operation

But there are challenges:

1. There are no Festival programming targets
2. There is no written interpretation presented to the Board of the Festival company by the Artistic Director

2.1.3 Programming is syncretic and offers many high-quality concerts from the jazz diasporas. It reaches critical expectations of an international jazz festival product.

But there are challenges:

1. Forward planning is non-existent; despite the continuity of Artistic Director over many years, previous Festivals have been programmed on the spur of the moment; rushed scheduling may characterise jazz programming elsewhere, but there must be creative, financial, marketing and political advantages for Brecon in a long-sighted approach
2. At October 2003, the artistic direction for the 2004 Festival and beyond is undetermined
3. The Theatre is a better forward planner than the Festival
4. There is no Education and Outreach work at the Festival
5. Programming innovation is constrained by the absence of longer-range programming ideas mooted with promoters and agents
6. There are no pan-festival alliances for international touring
7. There are no 'sell-offs' to other venues from imported overseas artists

2.1.4 There are management shortcomings that need to be addressed

1. The contracting of many artists is superficial and inattentive to audit requirements
2. Branding and identity for the Festival is old-fashioned
3. Business planning standards are unsatisfactory
4. There is no strategic marketing plan currently being applied; only an advertising budget is planned for the year, with brochures, advertising and tactical promotion
5. Market awareness, data capture and analysis are poor
6. The requirements to effectively market the Festival should include national promotion by the Wales Tourist Board
7. The Friends of the Festival are an underdeveloped but potentially significant asset

2.2 OPINION AND RECOMMENDATIONS

The overarching recommendation is for the Board of the Festival Company to redefine its objectives. By starting again from a new foundation, the Festival has improved its operation and has good reason for the commitments from Welsh Assembly Government and the Arts Council of Wales. Changing the board governance structure may be desirable, especially the recruitment of new members, but without reassessment and a new vision, is unlikely to be effective. Other principal recommendations follow from this:

1. A strategic five-year business plan should be written
2. A statement of artistic policy and proactive programming ambition should be adopted by the Festival Board
3. The new Festival board should conduct a skills audit and recruit additional Directors as required. The Festival and the Theatre need to decide whether the new Company is: EITHER a 'Theatre-controlled' non-profit company with a majority of Theatre-nominee directors OR a 'Theatre-influenced' non-profit company with a majority of 'independent' directors
4. The Festival can only move forward by the Board considering options for the artistic direction of future Festivals. These options are:
 - Recruit an accomplished and knowledgeable Artistic Director for three festivals in 2004, 2005 and 2006, giving the person time to plan ahead
 - Reappoint the previous Artistic Director for 2004
 - Unify the management and artistic strands by appointing the Executive Director as Festival Director for 2004 and/or beyond, with the proviso that he engage an accomplished and knowledgeable part-time Associate Director to assist in programming [this form is familiar in other festivals, such as the Edinburgh International Festival]
 - Engage an artists' agency to programme the 2004 Festival [this form was familiar in classical music festivals until the 1980s; a company such as 'Serious' or JVC could be hired, but although the programme would be competent, it is likely to be cautious, favouring their own stable of artists, and be unattractive to the funding bodies]
5. If the Board resolve to recruit a new Artistic Director, this post should be advertised immediately. [Nevertheless, the likelihood of appointing someone in time to plan properly for the 2004 Festival is unlikely; a person specification is part of this report]
6. An Artistic Director, or Associate Director, must be able to develop adventurous new programming to demonstrate the uses of jazz; whether from improvising musicians and free jazz, fusions and crossovers, jazz performances with dance, classical music, or exhibitions of jazz images

7. If the Board appoint the Executive Director as Festival Director (thereby giving him programming *and* management responsibility), the Theatre should recruit a personal assistant or other administrative support for its year-round activities
8. Brecon International Festival of Jazz Limited should apply for charitable status, like Brecon Guildhall Theatre Limited
9. To test future growth (beyond one weekend), a Festival market appraisal should be commissioned
10. The Festival marketing should be overhauled
11. Efforts to interact with festival-goers in new ways should be investigated; including a Festival year-round education and outreach programme
12. A suite of Festival performance indicators should be adopted, including programming targets
13. Efforts to attract new external funding through a revised corporate membership and sponsor scheme should be made
14. Efforts to restore Powys County Council funding should be made, including invitation to Council to appoint an ex-officio or nominee board member
15. Application should be made to Wales Tourist Board for a marketing grant
16. Application should be made to Brecon Town Council for a respectable Festival revenue grant
17. There should be a drive to increase the enrolments for the Friends
18. Important operations issues must be addressed: contracts for all performers must be negotiated, prepared and signed by the Executive Director, whomsoever is the Artistic Director; the Artistic Director/Associate Director should nominate artists, but business dealings with agents must be the responsibility of the Executive Director
19. All contracts involving hotel stays must contain explicit detail for what artists may and may not charge to the account; corresponding letters from the Executive Director should be issued to hotels; all artists' fees must be vouched by tax invoices

3. ACTION PLAN FOR FESTIVAL STRATEGY

	ACTION	BY WHOM	WHEN
1.	To consider the findings of this report, discuss as appropriate; foremostly to determine the form of Artistic Direction for 2004	Board of Jazz Festival Board of Theatre	October 2003
2.	To convene the present Festival Board to consider re-visioning the Festival through strategic and change management, for operations	Board of Jazz Festival, Executive Director	November 2003
3.	To share the conclusions of this report with key partners	Arts Council of Wales, Welsh Assembly Government, Brecon Town Council, Powys CC, BBC	December 2003
4.	To advertise for an Artistic Director or search for Associate Director	Executive Director and Board recruitment subcommittee	December 2003
5.	To short list, interview and appoint an Artistic Director or Associate Director	Board of Jazz Festival, Executive Director and Arts Council assessor	January 2004
6.	Undertake market appraisal for the Brecon Jazz Festival	External Marketing Consultant	February 2004
7.	To clarify the objectives, identity, ambition, standards and management of the Festival, upon the appointment of new Artistic Director or Associate Director	Festival Chairman, Executive Director, Artistic Director	February 2004
8.	To create an Educational and Outreach policy	Executive Director, Artistic Director, Royal Welsh College of Music and Drama	March 2004
9.	To determine the 2004 Management Agreement between Festival and Theatre	Board Chairs, Executive Director, Financial Administrator	March 2004
10	To prepare a strategic five-year improvement plan; with costs and benefits	Executive Director, Artistic Director, Financial Administrator and Festival Board sub-committee	April 2004
11	To consider funding implications of new operations	Arts Council of Wales, Welsh Assembly Government, Powys CC, Brecon Town Council	May 2004
12	To finalise new service delivery agreement and revenue subsidy levels with partners	Festival Chairman, Executive Director	May 2004
13	To determine effective new monitoring and evaluation frameworks	Executive Director, Artistic Director, Financial Administrator	May 2004
14.	To monitor the Operations Plan	Executive Director, Financial Administrator	Ongoing

3. COMPANY STRUCTURES; INTEGRATION AND OPERATION OF THE TWO COMPANIES

3.1 A note on the promise of management cooperation

Management sharing between non-profit performing arts organisations is an intuitively attractive notion; at Brecon, the management of the Festival by the Theatre was seen by the two organisations and the funding bodies as the only way of ensuring that the event survived the overwhelming deficits and liquidation of the festival company. The Theatre is dedicated by its articles of association to serve the public interest in the performing arts. Compared to the commercial sector, then, the barriers to effective cooperation seem low, and the potential payoffs high. The Festival was able to be staged in 2002 and 2003 under an interregnum arrangement; this worked well, in practice as well as in theory.

The shining success of the Brecon arrangement is a considerable achievement in the performing arts world. There are few successful instances of cooperation elsewhere, where a wide disparity exists between cooperative rhetoric and cooperative record. It is worth noting this disparity here, because the Boards of the Theatre and the Festival should be aware that cooperation has gone wrong elsewhere and, by implication, it might go wrong at Brecon in the future.

The most representative incarnation of cooperation is the attempt by a receiving theatre or a performing arts centre to provide central management services to their resident groups, as is supposed to happen at the new Wales Millennium Centre with its seven constituent companies. At Brecon, the Theatre and the Festival are required to execute the same basic administrative functions. These tasks, such as bookkeeping and accounting, marketing, advertising, box office operations, scheduling, site management, negotiating, contracting, purchasing, fundraising, accommodation, travel arrangements and grant applications, require staff time and attention. Pooling responsibility for these tasks is, in theory, a means of saving money through achieving economies of scale and administrative rationalisation. It should be less expensive for the Theatre to produce services for a weekend-long Festival than for the Festival to produce the same services on its own.

For the funding bodies, economies of administrative scale might represent an opportunity to stretch their subsidy and to promote better management, especially if they perceive the Theatre to be better run than the Festival. Funding bodies do not happily tolerate duplication and inefficiency. From their standpoint, cooperation also allows easier monitoring of Theatre and Festival performance, because formerly diffuse responsibilities and systems such as performance indicators and computing are lodged in a single office and executed through a single set of procedures.

The Theatre is not only one of the most important venues for the Festival, but also the intersection with these functions; no other organisation in the town was able to help (although it might possibly be supposed that the Festival could have been directly managed by the Brecon Town Council or the Museum). In the event, the Theatre was the logical choice to provide management services, as well as being unengaged with the artistic ambitions of the Festival. Through cooperation with the Festival, the Theatre could expand its role in Brecon and within the Wales arts community; over

five years, its responsibility has already transcended simply operating the building and it is now an active programmer.

There is no clear model or body of knowledge about successful cooperation in the UK, for the Brecon precedent. However, interest in cooperation and merger is alive in all quarters: some theatre managements have merged because of duplication (for instance, where an oversupply of seats in a reducing market would have led to the collapse of one of the standalone venues, as at Sheffield, Northampton, Edinburgh, Southend and Westcliffe on Sea, and Liverpool), and theatres in Wales cooperate with joint programming through the Mid Wales Entertainment Circuit, a consortium that includes Theatr Brycheiniog. Elsewhere, especially in North America and Australia where arts centres and receiving theatres attempted central servicing for resident companies and festivals from the 1970s, cooperation is usually an ordeal: resident groups sharing management services provided by a receiving theatre often resisted, refused, and impeded the implementation and continuation of centralised support. The most important factor in cooperation at Brecon will be the continuing 'trust' between the two companies; the managers must have confidence in their own abilities and rely on the advantages of the new structures, whilst avoiding the worst attributes of personality, suspiciousness, egotism, competitiveness and incompetence that are familiar elsewhere, especially where artistic directors are extremely wary of having their image diluted, and have been known to defend their autonomy above everything else.

The primary objectives of shared management – efficiency, and control through the consolidation of the basic management services – were not sufficiently important to the Theatre and the Festival to galvanise them into cooperation before 2001; it was the financial collapse of the Festival that led to the affiliation. If anything, these objectives might be inclined to sharpen resistance in future years. It will be important for the Boards and funding bodies to consider that cooperation is more likely to work over time when its basic objectives are to provide access to new markets for both organisations, or other opportunities where both the Theatre and the Festival stand to gain, yet neither can penetrate independently. Private sector fundraising and corporate sponsorship campaigns by a united Brecon organisation are one actual example of this approach; another resides in regional marketing and an education programme. There may be new sources of funds (such as the local authorities) which the Festival cannot tap independently of the larger, more influential Theatre board. Some corporate sponsors may respond better to coordinated appeals from one town, rescuing them from hours of deliberation over many proposals. And with the Wales Millennium Centre on the horizon, a stronger Brecon performing arts management is better placed to compete with Goliath, for sponsorship and top artists. The marketing of the Festival also falls into this category. It has been difficult for the Festival to institute effective marketing designed to draw visitors from new areas because of the expense of marketing staff and maintaining festivalgoer profiles; the expense of advertising beyond the existing mail shots and music press is likely to exceed additional revenues received. However, with the Theatre and Festival sharing marketing, there is better potential to sell the location by appealing to the tourist boards and local authorities for concerted effort. Furthermore, a visitor to Brecon who comes to see the Festival, for example, may come back to see the Theatre programme at other times. Of course, there is a wider marketing question, which might be better tackled by cooperative management: the free-rider problem, where other businesses in Brecon benefit from

the Festival marketing but contribute nothing to its cost. Perhaps the cooperative muscle of Theatre and Festival will be able to avoid this dilemma by working with the Brecon Town Council to distribute costs across all organisations that stand to benefit from the Festival.

It may be seen that the increased subsidy from Welsh Assembly Government coupled with the Theatre's management of the Festival, offers an exciting new future for the event. In turn, this obliges the Festival with responsibility to redefine its objectives (that should in future be specific, measurable, achievable, relevant and time-bound), and to prepare a new business plan.

3.2 Governance options and legal frameworks

The organisation of the collaboration will have an important impact on its chances of continued success. The two basic criteria for an effective arrangement are functional capability of accomplishing the artistic goals of the Theatre and the Festival, and the political acceptability to the parties.

Although not specially crafted, two separate non-profit companies limited by guarantee are intended to give clear legal identities to the two organisations. Neither the Theatre nor the Festival is expected to dominate; the cooperation is theoretically one of equals. The two companies signal that the organisations have not been formally merged; there has been no beneficial or unwholesome takeover of the Festival by the Theatre. Henceforward, the crucial question about cooperation is whether it will now help the Festival to achieve its artistic vision, whilst assisting the Theatre's reputation as an entrepreneurial management. At some in the future, it might be economical to merge the legal frameworks entirely, but for now a high degree of Festival autonomy is essential. There would be an element of the "death" of the Festival if it was subsumed by the Theatre; handling public relations would be sensitive; long-serving patrons might be indignant; press coverage might be negative; and relations with the music industry peers and the funding bodies might be negative.

The new Festival company should operate more entrepreneurially than direct management by the Theatre; focussing on jazz alone, in turn it must fend for itself and set its own direction and policy; with freedom to manage innovatively within the partnership.

3.3 The Boards of Directors

At present, the new Festival company has three Directors: Peter Norbury (Chairman), Tony Elston and Walter Dickie. (Mr Elston is also Secretary). Two Directors are members of the Theatre board, and it interlocks also to the extent that these Directors, Messrs Norbury and Elston, are Chairman and Vice-Chairman respectively of the Theatre operating company, Brecon Guildhall Theatre Limited.

The Theatre Board comprises twenty Directors, of whom seven are nominees of community and local arts organisations, three are nominees of Powys County Council,

two are nominees of Brecon Town Council, and eight co-opted Directors, including the Chairman and Vice-Chairman.

The Theatre Director, Andrew Eagle, as Executive Director of the Festival, has dual responsibilities to both companies.

The small Board membership of the new Brecon International Festival of Jazz Limited is an interim arrangement during the recent incorporation. The Festival and the Theatre need to decide whether the new Company is:

- EITHER a ‘Theatre-controlled’ non-profit company with a majority of Theatre-nominee directors
- OR a ‘Theatre-influenced’ non-profit company with a majority of ‘independent’ directors

No *statutory* impediment prevents the Directors from having membership comprising a majority of Theatre-nominee directors, just as there is no law that *requires* the Directors’ membership to be independent of the Theatre. In a small community such as Brecon, a degree of correlative membership (and potential conflicts of interest) is probably inevitable under any arrangement.

In either scenario, areas for future board membership (or representation) might include:

- Powys County Council
- Brecon Town Council
- Royal Welsh College of Music and Drama
- The Friends of the Brecon Festival
- Brecon Jazz Club
- The Board of the Theatre Brycheiniog
- Wales Tourist Board

As for other Board members (who would preferably overlap with the nominees so as not to create another large board), new people with relevant skills, experience and knowledge of jazz and the performed arts need to be identified soon, from diverse, individual interests. This may require a search (and advertising) beyond Brecon. Appropriate areas might include:

- Jazz criticism and jazz education
- Marketing
- Law
- Finance
- Broadcasting
- Event management
- Cultural tourism

It would be important for some Directors to be from the musical communities served by the Festival programme, whether amateur, professional or academic. To assist the

Theatre's efficient servicing of the Board, the size should be kept manageable, without proliferating sub-committees. A membership of seven would seem optimum; most successful arts organisations are governed by small boards today. Unless it is intended that the Festival Company be a controlled entity of the Theatre, there is no need for a completely interlocking membership of the two Boards; one Director nominated by the Theatre would seem sufficient, and in turn one other Director from the Festival Board could be nominated to the Theatre Board.

The role of the Festival Board of Directors would essentially be similar that of the Theatre Board:

1. To represent in the public forum the policy of the Brecon International Festival of Jazz
2. To speak for the Brecon International Festival of Jazz and to further by all practical means the purpose of the Festival
3. To set up good relations with Powys County Council, Brecon Town Council, Welsh Assembly Government, the Arts Council of Wales, Wales Tourist Board and other funding bodies and organisations in government which would enable a new policy to have artistic and financial integrity
4. To maintain cooperation with Brecon Guildhall Theatre Limited
5. To set up good government within the Festival, and be continually aware of current and future progress within the policy framework

At all times, but especially at this time of interregnum management, the Festival Board is not only the legislative authority, but also the link between the Festival itself and the communities it serves: the musicians, staffs, the audience and the other stakeholders. It is governing an artistic policy in which its predecessor took a kindly and enthusiastic interest, but about which it now has moderate technical knowledge, especially of external trends in festival management. The previous Festival board with the advice of honorary patrons (whose transfer to the new company needs to be formalised) no doubt worked adequately during most years of Jed Williams' authoritative artistic directorship. Nevertheless, the new Board (with its newly recruited and enlarged membership) must know, severally and collectively, in practice and in general terms, what it really wants to do now, and, later it must be constantly useful as a critic to the Artistic Director. The better the programmer, the freer hand she or he will demand, but no Artistic Director should want a freedom that becomes isolation. The board's criticism of the artistic policy must be well instructed. Everyone is – or thinks they are – competent to criticise artistic policy, and it is true that individual board members do know a lot about the Theatre and the Jazz Festival. Nevertheless, what may be desirable in the immediate future are the contributions from new board members from the music industry (in addition to other business, political, financial and strategic planning skills). By these means, the Artistic Director, the visiting musicians, the funding bodies and other stakeholders would have confidence in the new Board as the conscience of musical and business decision-making.

3.4 The Management and Artistic Direction

As soon as possible, the Board of Directors of the Festival must appoint a new artistic programmer, who would be employed by the Festival and not the Theatre. Before selecting a framework for the senior management, the Festival Board will need to develop a five year business plan that clarifies their intended strategy for future Festivals.

The new artistic and management challenges in the business plan will have important implications for the choice of candidate. The programmer is the key person whose actions will determine whether future Festivals meet those challenges. Therefore, to ensure musical success, a suitable candidate will need cosmopolitan experience and world-wide contacts, intellectual strength, experience of dealing with artists, interest in all forms of jazz, and a commitment to the education of audiences and artists. To ensure management success, the suitable candidate will need proven skills in budgeting, negotiating and contracting and all the other functions of planning and running a festival, concert hall or theatre. The business plan should provide criteria for choosing a suitable candidate, establish guidelines for some of her or his key programming decisions and budget, and give a new basis for subsequent performance evaluation. (The previous contracts with the Artistic Director were significantly lacking in accountabilities). A brief would need to include, at least a statement of the Festival Board's objectives for future Festivals, the likely economic constraints, the Artistic Director's major duties and responsibilities, the broad planning and control processes to be used by the Theatre management in administering the Festival and a statement of the Board's own responsibilities, with specific attention as to how the Board will assist the artistic direction.

The Festival can only move forward for 2004 by the Board considering options for the artistic direction for next year. These options are:

1. Recruit an accomplished and knowledgeable Artistic Director for three festivals in 2004, 2005 and 2006, giving the person time to plan ahead
2. Reappoint the previous Artistic Director for 2004 (although a new leadership is likely to alleviate any tensions emerging out of the interregnum arrangement)
3. Unify the management and artistic strands by appointing the Executive Director as Festival Director for 2004 and/or beyond, with the proviso that he engage an accomplished and knowledgeable part-time Associate Director to assist in programming [this form is familiar in other festivals, such as the Edinburgh International Festival, where dance and music programming specialists assist the chief executive]
4. Engage an artists' agency to programme the 2004 Festival [this form was familiar in classical music festivals until the 1980s; a company such as 'Serious' or JVC could be hired, but although the programme would be competent, it is likely to be cautious, favouring their own stable of artists, and be unattractive to the funding bodies]

If the Board resolve to recruit a new Artistic Director, this post should be advertised immediately. Nevertheless, the likelihood of appointing someone in time to plan properly for the 2004 Festival is unlikely; it may be easier to reappoint the previous Artistic Director, or to follow the third option of the Executive Director taking overall responsibility with an Associate Director. An Associate Director could be engaged without advertising the post; providing the Board and Executive Director interview anyone nominated by them.

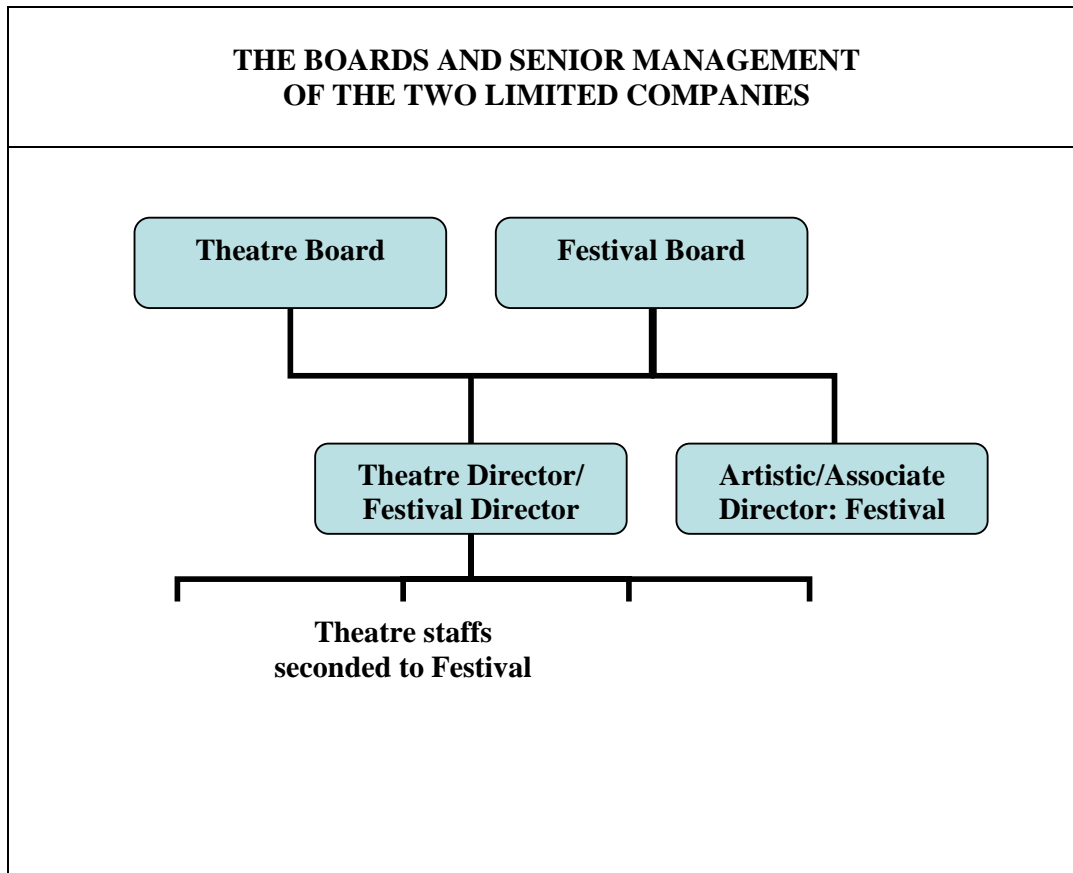
Whatever the arrangement, the artistic programmer must be able to develop adventurous new programming to demonstrate the uses of jazz; whether from improvising musicians and free jazz, fusions and crossovers, jazz performances with dance, classical music, or exhibitions of jazz images. It will be no revelation to the Boards to emphasise that so much of the Festival's future success depends on the personality and inclination of the leader, whether that person is the Executive Director, the Artistic Director, an Associate Director – or a coalition. Is she or he essentially a manager appointed by the Board, with a mandate to spend and control a budget and attract festival-goers? Alternatively, is she or he an artist, promoter, critic or at least someone with palpable jazz sensibility and intellect, who nourishes the creative ideals and the strategic vision of the Festival? Can she or he be in any way identified as the personification of an artistic vision?

Such questions act as a sort of checklist. It all boils down to the 'vision thing', tied to the Brecon location and realities of the programming choices and audience, and the programmer having the skills, energy, knowledge, imagination and determination to implement the new strategic vision. Where might the Board observe success elsewhere? Where might the Board observe a healthy balance of musical credibility and financial stability? Where might the Board observe festival leadership which is proactive rather than reactive, that provides critical perceptions of what is possible and what is impossible, that discriminates between good and bad, that understands finance, fundraising and the politics of subsidy, and is able to make decisions?

The Board might consider the calculated risks, achievements and distinctiveness of the ten-year old folk festival, Celtic Connections. This may serve as a structural prototype for Brecon. This Festival is managed directly by the Glasgow Royal Concert Hall (but presents concerts in other venues). The concert hall management acts as impresario, its chief executive engages a programmer/artistic director, Colin Hynes, and empowers the Hall's management team to service the Festival. The leadership of the chief executive unifies every aspect of policy in the festival *and* the year round programme of the concert hall. This management structure might be similar to that at Brecon in future; the process of festival management should be communication between a leader and the visiting musicians on the one hand and the public on the other. There may be a shortage of potential candidates to manage and programme the Brecon International Festival of Jazz in its entirety, especially someone who would be unstrung by the fundamentals of the businesslike cooperation required with the Theatre; the recruitment task may be exacting, but this is certainly no reason for delaying; the Board must decide as soon as possible.

If the Board appoint the Executive Director as Festival Director (thereby giving him overall programming *and* management responsibility), the Theatre should recruit a personal assistant or other administrative support for its year-round activities.

This chart draws the position of the four 'key players' discussed so far:



3.5 Specification for artistic director/associate director.

Whatever the arrangement adopted, the role of the Artistic Director/Associate Director should be to create a series of outstanding annual festivals by:

1. Providing musical knowledge and leadership to ensure that the annual Brecon International Festival of Jazz maintains its position as a leader in the arts and entertainment industry, and be the pre-eminent Jazz festival in the UK
2. Developing the scope, character, quality and uniqueness of the programme, across all jazz styles
3. Assisting the Executive Director/Festival Director in developing a strategic plan to optimise the economic returns from commercial and sponsorship opportunities
4. Developing and implementing a strategy for collaborations to expand the Festival programme while noting the Festival's budget
5. Drawing audiences from a broad cross-section of age groups and socio economic areas of Wales, elsewhere in the United Kingdom and abroad
6. Developing the public and critical profile of the Festival

7. Assisting the Executive Director/Festival Director in communicating the Festival's aims and objectives to the relevant Government, industry, community and corporate organisations
8. Assisting the Executive Director/Festival Director by informing the Board of all relevant issues by way of management and Board reports
9. Assisting the Executive Director/Festival Director in devising and implementing an artistic, business and corporate plan
10. Creating a stimulating work environment which motivates staff and encourages excellence and innovation

The Artistic Director/Associate Director will be a person who wants to have a:

1. Challenging and stimulating high profile job in music
2. High level of influence as an opinion maker, musician, programmer, teacher or critic in the world of jazz
3. Chance to create an artistic vision for a vibrant jazz festival
4. Opportunity to contribution to the cultural life and economy of Brecon
5. A position which blends business and arts management with an impresarial programming role

The Artistic Director/Associate Director will be motivated by:

1. Balancing artistic and financial priorities in a fluid environment
2. Procuring a program that is critically and commercially successful
3. The need to maintain/raise the commercial returns at the box office
4. The need to maintain/raise the level of corporate support for the Festival
5. Co-operating with an entrepreneurial receiving theatre management
6. Contributing to the Theatre's own jazz schedule, educational and community work
7. Co-operating with a competitive Theatre in securing sponsorship and Government funds
8. The ever-increasing complexity of the sponsorship market and tightening corporate budget

3.6 The Staffing and remuneration for the two companies

The Artistic Director's previous contract was for 2002 and 2003, when he was engaged as a self employed sole trader, providing programming services for a fee of £21,630 for 2002, and the same plus indexation for 2003: £23,977. Mr Williams has lived in Cardiff and the vicinity of the Festival. He travelled on Festival business occasionally, to London, Toulouse and Edinburgh.

In the event of a new Artistic Director being engaged for 2004 and thereafter, a key factor in the Board's negotiation will be her or his place of residence; whilst the fee is adequate compensation for the tasks of programming a complex two-day Festival, it is unlikely to be attractive enough to entice a new Artistic Director from outwith the region, to move to Brecon or South Wales. Wherever the person resides, it will be essential to visit Brecon to work with the Executive Director, attend meetings in the town and elsewhere in Wales. There could be significant increased travel and

accommodation costs for a new Artistic Director; possibly causing an all-up expenditure of £33,000. There would also be on-cost implications (for National Insurance, pension contribution &c) if the person is contracted as an employee.

If an Associate Director is engaged, a lower fee might be awarded – perhaps £15,000 – and the balance could be used to compensate the Theatre for the Executive Director's additional services. This would allow for a PA to Mr Eagle, say £12,000.

3.7 The Management services provided by Theatr Brycheiniog

Coordination of services creates a direct cost from the Theatre to the Festival. This was estimated at £60,000 in 2003 for all overhead expenditure incurred, including proportionate and legitimate refunds of core salaries for the Theatre staff. This agreement has worked satisfactorily.

My criticism of the management services provided is as follows:

1. The contracting of many artists is superficial and inattentive to audit requirements: it would seem that the Artistic Director has not yet acclimatised to administrative expectations of the new management. Important operations issues must be addressed: contracts for all performers must be negotiated, prepared and signed by the Executive Director, whosoever is the Artistic Director; in future, the Artistic Director/Associate Director should nominate artists, but business dealings with agents must be the responsibility of the Executive Director. In 2003, there were unsystematic contracts made involving musicians' hotel stays; these must contain explicit detail for what they may and may not charge to the account; corresponding letters from the Executive Director should be issued to hotels; all artists' fees must be vouched by tax invoices
2. Branding and marketing identity for the Festival is old fashioned
3. Business planning standards are unsatisfactory
4. There is no strategic marketing plan currently being applied; only an advertising budget is planned for the year, with brochures, advertising and tactical promotion
5. Market awareness, data capture and analysis are poor; a market appraisal would be helpful for confirming the duration of the Festival weekend, or whether the jamboree could be extended by a day or more
6. The requirements to effectively market the Festival should include national promotion by the Wales Tourist Board
7. The Friends of the Festival are an underdeveloped but potentially significant asset
8. The Theatre should share in the financial benefit of the liquor bars concessions

3.8 Charitable status

Brecon Guildhall Theatre Limited is registered as a charity, but so far Brecon International Festival of Jazz Limited has not applied for charitable status. Application to the charity commissioners make take several months; a key issue is likely to be that the Commission needs to be convinced that the new set-up is a genuine educational charity, independent of the Theatre company and local authority. The Commissioners may insist (a) that negotiations with them are conducted by the small group of Directors (who will also become charity Trustees) – not by the staff, and (b) that the Theatre *had* to separate out the Festival activity as an ‘educational’ and ‘artistic’ activity, and (c) they may insist on it being transparent that the Board (the Trustees of the Charity) are genuinely independent of the Theatre. The Charity Commission is known for its officialese; the success of the negotiations with the Commissioners may hinge on being led by genuinely independent people – the core, independent Board members.

The advantages of gaining registered charitable status are to aid the Festival’s fundraising (the public do feel assured donating to charities that are registered) and to benefit from preferred tax status. In the event of the Festival leasing property in future, as a registered charity, it would be eligible for mandatory 80 per cent relief found centrally; with the remaining 20 per cent waived at the discretion of the local authority.

4. THE ARTISTIC POLICIES OF THE BRECON INTERNATIONAL FESTIVAL OF JAZZ

4.1 Frameworks for the artistic direction of the festival

The Festival has proclaimed itself as the largest event in the UK for different jazz musics, from established to the young and ineffable, from professional to amateur. Viewing the world of jazz from so many perspectives has worked well for Brecon, overriding the factionalism and pigeon-holing of many other festivals.

4.2 Programming gaps and development

The Festival has usually presented jazz as a musical art form. Are there other jazz categorisations to present? With the opening of the Theatre five years ago, the town has an excellent lyric stage; this was put to good use with the jazz-drama version of *Under Milk Wood* this year, and the Festival might also use it for presenting jazz-dance companies. Could the Festival encourage a Wales ballet dance company to stage a ‘jazz ballet’? Could the Theatre-Festival association lead to a ‘Jazz Pantomime’ at Christmas?

From discussions with the persons consulted for this report, it seemed that the programme may be constrained by the following factors:

1. The non-existence of forward planning; despite the continuity of Artistic Director over many years, previous Festivals have been programmed on the spur of the moment; rushed scheduling may characterise jazz programming

- elsewhere, but there must be creative, financial, marketing and political advantages for Brecon in a long-sighted approach
2. The Theatre is a better forward planner than the Festival and the management arrangement should improve the Festival's ability to plan
 3. Programming innovation is constrained by the absence of longer-range programming ideas mooted with promoters and agents
 4. There are no pan-festival alliances for international touring; although the Artistic Director has visited jazz festivals at Edinburgh, Paris and Toulouse in recent years, Brecon would benefit from better networking in world-wide jazz fraternity.
 5. There are no 'sell-offs' to UK venues and concert halls from imported overseas artists; this might be a modest source of profit as well as profile-raising for Brecon
 6. The Artistic Director and Executive Director need to collaborate closely on determined concert durations to ensure that overruns do not invade other starting times

4.3 Potential and scope for an Education and Community Policy

Historically, a two-day summer Festival might not have been expected to have an educational or outreach programme. However, music festivals of all styles are now improving their creative, festival aspiration and uplift through education work that an Artistic Director decides to be an essential part of the policy. At North American jazz festivals, for instance, aspiring musicians collaborate with accomplished mentors in a highly creative atmosphere. The rural and small-town locale of Brecon offers festival-goers, students and artists the chance to admire, room to wander and, most important, room to think. Today, other festivals organise year-round lecture series, pre-festival briefings for residents, conversations, teachers' days, master-classes and a residential seminar with accommodation option. The new synergy between the Festival and the Theatre makes a year-round jazz presence a strong possibility, not only by revamping the jazz roots exhibition in the top gallery, but also scheduling more jazz concerts in the main auditorium and studio theatre. For education and outreach, new partners would need to be found; perhaps with the jazz courses at the Royal Welsh College of Music and Drama, Cardiff.

4.4. Relations with BBC Wales, Arts Council of Wales and other stakeholders

A critical relationship for the Artistic Director and Executive Director to maintain is the management of the broadcasting deal with BBC Wales, worth £23,000 in 2003.

An aspect of managing the Festival is the relative power of the funding bodies. Both officers must share the accountability to the funding bodies; they can create major impediments for the cooperative arrangements if communication is not handled well. The Chairman must also be involved with dealings with the Arts Council of Wales.

A grant application could be made to the Arts Council of Wales for subsidy towards the employment and programme costs of an education officer for the Festival.

5. FINANCIAL PLANNING AND DEVELOPMENT

5.1. The business of the two companies

Interim results underscore the new management's good husbandry of the Festival:

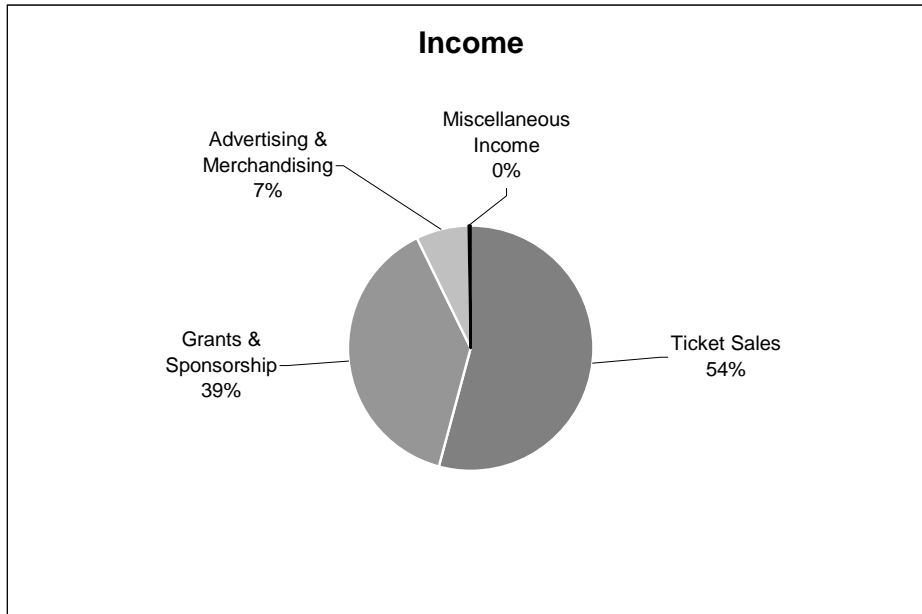
BRECON INTERNATIONAL FESTIVAL OF JAZZ ESTIMATED INCOME AND EXPENDITURE 2003		
Income		
Ticket Sales		
Box Office Sales	242,245	
Booking Fees	2,925	
Ticket Sales		£245,170
Grants & Sponsorship		
Sponsorship	36,257	
Donations	1,624	
BBC Fee	23,000	
<i>Grants from UK Public Bodies</i>		
National Assembly	90,000	
Arts Council of Wales	25,256	
Brecon Town Council	100	
Powys County Council	0	
Grants & Sponsorship		£176,237
Advertising & Merchandising		
Advertising Income	3,510	
Stall Fees	8,724	
Bar Concession	4,500	
Merchandising Rights	6,000	
Programme Sales	8,523	
Advertising & Merchandising		£31,256
Miscellaneous Income		
Miscellaneous Receipts	615	
Bank Interest Received	272	
Miscellaneous Income		£887
TOTAL INCOME		£453,550
Less Expenditure		
Wages & Salaries		
Theatr Brycheiniog Management Charge	43,304	
Artistic Director's Fees	23,977	
Business Planning	1,147	
Stage Management	4,505	
Stewards	588	
Wages & Salaries		£73,521
Venues & Occupancy		
Premises	850	
Venues	7,170	
Canopies & Marquees	16,597	

Street Arrangements	13,486	
Rent	2,600	
Cleaning	23	
Venues & Occupancy		£40,726
Administration & General Costs		
Administration		
Telephone	1,275	
Postage	4,390	
Stationery & Office Expenses	1,062	
IT & Box Office Supplies	3,401	
Legal & Professional Fees	420	
Bank Charges	116	
Donations Paid	65	
Licences, Subscriptions & Affiliations	1,262	
Cardnet Service Charges	2,745	
Sponsors Hospitality	1,045	
Car Hires	1,286	
Travel & Subsistence	1,487	
Bank Interest Paid	11	
Bank Charges	87	
Administration & General Costs		£18,650
Marketing & PR Costs		
Advertising	6,583	
PR & Promotion	8,362	
Printing & Design	8,334	
Marketing & PR Costs		£23,279
Musicians' Costs		
Musicians' Fees	131,650	
Musicians' Accommodation	16,281	
Musicians' Hospitality	1,423	
Musicians' Dressing Rooms	396	
Musicians' Travel	19,985	
Musicians' Costs		£169,735
Festival Production Costs		
First Aid	2,011	
Seating	2,719	
Toilets	2,640	
Communications	2,193	
Sound Systems	20,464	
Pianos	7,361	
Lighting & Staging	24,035	
Instrument & Equipment Hires	5,380	
Technicians Accommodation	4,268	
Security	4,840	
Festival Production Costs		£75,910
Total Expenditure		£401,821
Estimated Net Surplus (Subject to PRS/late accounts &c)		£51,729

BRECON INTERNATIONAL FESTIVAL OF JAZZ 2003
WHERE THE INCOME CAME FROM:

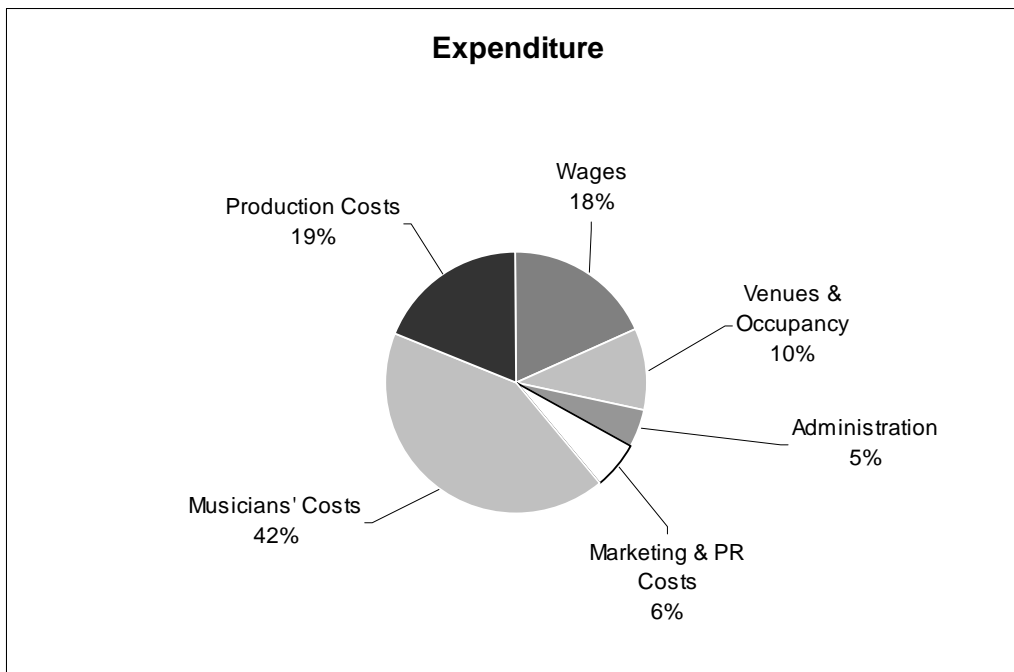
The total cost of the 2003 Festival was £401,821.

61% of the Festival's income was generated through earned income.
Earned income included 54% from tickets sales, 7% from advertising and merchandise, and 14% of the Festival's income came from sponsorship and donations.
25% of the Festival's income came from public sector grants.



HOW THE INCOME WAS SPENT:

79% of the Festival's expenditure went directly to paying for presentations
6% was spent on marketing the event and ticketing
5% was spent on administering the operation of the Festival
10% was spent on venue hire

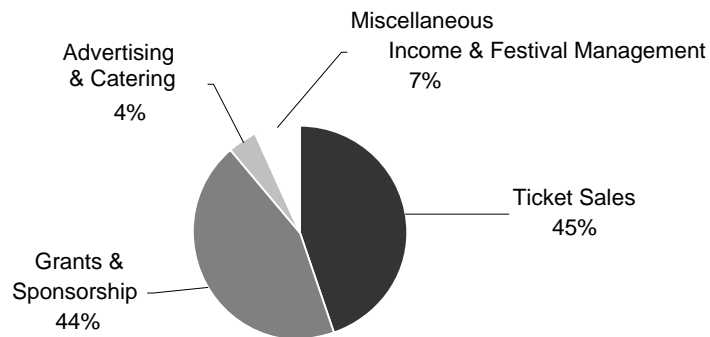


THEATRE BRYCHEINIOG		
ACTUAL INCOME AND EXPENDITURE FOR THE YEAR ENDING 31 MARCH 2003		
<u>Income</u>		
Ticket Sales		
Box Office & Theatre Hires	220,908	
Rent	9,810	
Subscriptions	2,542	
Ticket Sales		£233,260
Grants & Sponsorship		
Sponsorship	5,452	
<i>Grants from UK Public Bodies</i>		
Brecon Town Council	15,000	
Powys County Council	110,160	
Mid Wales Entertainment Circuit	13,672	
Arts Council of Wales	68,704	
National Assembly	6,994	
Other Grants	3,965	
Capital Grants	8,551	
Grants & Sponsorship		£232,498
Advertising & Merchandising		
Merchandise & Programmes	1,775	
Bar Sales and Event Catering Net	21,814	
Advertising & Merchandising		£23,589
Miscellaneous Income		
Jazz Festival Management	32,872	
Bank Interest Received	14	
Other Income	2,081	
Miscellaneous Income		£34,967
Total Income		£524,314
<u>Less Expenditure</u>		
Wages & Salaries		£219,214
Venues & Occupancy		
Equipment Depreciation	14,352	
Charity Management	7,618	
Venues & Occupancy		£21,970
Administration & General Costs		£59,003
Marketing & PR Costs		£40,892
Show Costs (Share to Producers and Visiting Companies)		£174,410
TOTAL EXPENDITURE		£515,489
ACTUAL NET SURPLUS		£8,825

**THEATR BRYCHEINIOW 2002-2003:
WHERE THE INCOME CAME FROM:**

The total cost of operating the Theatre was £515,489
56% of the Theatre's income was generated through earned income.
Earned income included 45% from tickets sales, 4% from advertising and catering
Almost 7% came from managing the Jazz Festival
44% of the Festival's income came from public sector grants.

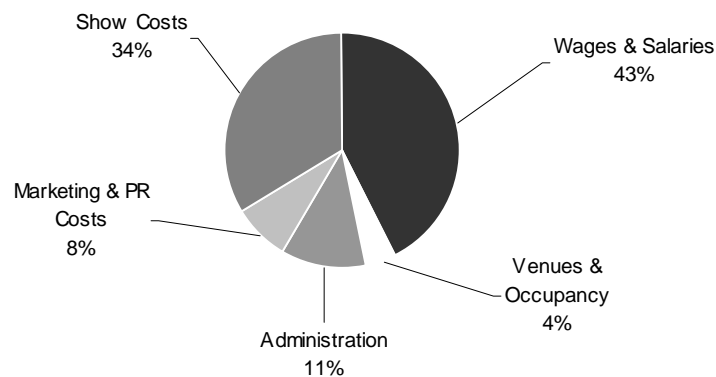
Income



HOW THE INCOME WAS SPENT:

34% of the Theatre's expenditure went directly to paying for presentations
8% was spent on marketing the Theatre and productions
43% was spent on wages; 11% was spent on administration; 4% was spent on buildings

Expenditure



5.2 Comparisons of the financial profiles of the two companies

For the partnership between the Festival and the Theatre, the following key comparisons may be noted:

1. At £454,000 and £524,000, the respective financial turnovers are similar, making the organisations good candidates for a continuing, balanced arrangement
2. The greatest disparity exists in local authority subsidies: the Festival received only £100 from Brecon Town Council, whereas the Theatre received £15,000 from Brecon and £110,160 from Powys County Council; how will the Boards handle the built-in tension between stable Theatre grants and unstable Festival grants?
3. At £5,452, the Theatre's sponsorship income is underdeveloped (but it is always hard for a receiving theatre in a small town to attract this money); the Festival's sponsorship income (excluding BBC Wales) was £37,881.
4. Marketing costs for the Festival (£23,279) at 6% of expenditure are low; the Edinburgh International Festival and many others spend 12% on promotion. Even the Theatre's marketing equivalent 8% seems low compared to other touring houses; as noted elsewhere, the whole subject of marketing the Festival warrants further study

In passing, from studying materials supplied by the Financial Administrator, I observe that the Theatre's monitoring and evaluation of the Festival is effective:

1. The service agreement between the companies is adequate
2. Progress statements of income and expenditure, measured against budget, are used appropriately
3. Reconciliation of the annual Festival budgets to actual income and expenditure is easily interpreted
4. The Theatre's financial reporting system is adequate for the Festival operation

When the new Festival Business Plan is written, these systems should be improved by the adoption of Festival programming targets, coupled with written interpretation presented to the Board of the Festival by the Artistic Director and Executive Director.

5.2 Sponsorship issues

The Festival raises a commendable amount of income from sponsors and donors, without the assistance of a full-time development manager or fundraiser. Efforts to attract new external funding through a revised corporate membership and sponsor scheme should be made, with consideration given to the employment of a part-time development specialist. In this regard, the Board should devise a strategy for roping-in the town businesses who derive so much benefit from the Festival but who are not corporate members. Fund-raising would be assisted by a new economic impact study; the methodology used in the Welsh Economy Research Unit study of 2000 is no longer current and, in any case, the findings needed to be interpreted and used by the Festival for advocacy. It might now also be better to commission a combined Theatre and Festival economic study.

5.3 Employment issues

A new yearly planning timetable for the Festival forms part of this report; after considering (and revising) this suggestion, the Executive Director will be able to determine staffing arrangements for the 2004 Festival. (See Section 8. page 32).

6. SWOT ANALYSIS

In order to inform the appraisal of the partnership between the Theatre and the Festival, I have conducted a summary of the strengths, weaknesses, opportunities and threats from the perspective of the Theatre and its publics. The following table emphasises views on how the arrangement is good and bad. The Board might now build on the potentially unique strengths of the arrangement, so that future strategy eventually reflects what the Theatre and Festival might do particularly well. Overall, the strengths and opportunities of collaboration outweigh the weaknesses and threats:

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • 20 years progress of the Brecon Jazz Festival; a well known name with good image for festival-goers and jazz artists • Long term commitment of Arts Council of Wales to the Festival • New commitments from Welsh Assembly Government • New collaboration is attractive to funders • Many lessons learned from 2 years; no massive upheaval for Theatre staff, and no redundancies for Jazz Festival staff who are hired annually • Brecon as ideal festival town • Availability of range of venues, with Theatr Brycheiniog as the new 'festival centre' • Theatre has good track record of cooperation through venue consortium • Good, moderately priced accommodation in the town • Experienced, youthful and ambitious theatre management • Good, reckonable base of 15,000 annual ticket sales in one weekend • Theatre has increased share of the market, less competition in Brecon and access to Jazz patron data • Festival keeps Theatre open for extra performances in otherwise dark summer • Partnership offers combined expectation of lower administrative costs and high artistic quality 	<ul style="list-style-type: none"> • Additional competencies on Boards of Directors may be required • Pressure is on to present third Festival under partnership, with undetermined artistic director/ate • Highly dependent on Theatre Director and Artistic Director competencies and cooperation • Takes big amounts of time and work on part of the Board • Festival has few sustained collaborative partnerships with other Jazz festivals • Relative to some other Jazz festivals, an impression of 'time-warp' • No education and outreach programme • Lack of effective forward business planning • Inadequate marketing • May be a higher degree of dependency of Festival on the Theatre • Risk of Board members in each organisation blaming the other for any failures • May be serious consequences for the Theatre if arrangements do not continue to work well

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Capitalises on both organisations' core capabilities • Two limited companies stop short of full of merger; valuable characteristics of individuality and diversity maintained • Strongly positioned artistic ethos against competitor festivals • Festival has shed costly mortgage of previous property • High national profile of Festival adds repute to Theatre • Larger size and collaboration harnesses strengths of both Theatre and Festival (who might be competitors in the context of subsidy) • Collaboration retains legal independence and artistic autonomy of both organisations • Dual charitable status can capitalise on fund-raising, without risk of being pulled in another direction or backwards by the Festival • Low set up costs in collaboration • Festival is not a competitor • Collaboration enables Theatre to retain or attract high-calibre Manager 	
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Framing a statement of the Festival Company's vision, mission and values • The recruitment of a new artistic director • Analysis and discussion of potential new programming • Expectation that new management and artistic direction will interact with festival-goers and artists in new ways • Need for increasingly sophisticated fundraising methods to build and maintain loyalty should benefit Theatre <i>and</i> Festival • Partnership gives Theatre more artistic rationale and credence with promoters and funding bodies; possibilities of new synergies • Partnership fits with Theatre's vision and mission as forward-looking presenting venue • Larger number of programming strands available within jazz oeuvre • Creating a distinctive identity through programme and marketing • Creating strategic alliances with other international jazz festivals, for programming • Development of Friends and use of volunteers 	<ul style="list-style-type: none"> • Competition from burgeoning mediocre and over-promoted festivals in neighbouring English towns • Failure to re-instate Powys County Council Festival subsidy • Competition from Wales Millennium Centre post-2004 • Failure to recruit artistic director • Maybe high costs attached to reinstating standalone Festival management if new arrangement fails

IMPLEMENTATION AND ACTION PLAN FOR FESTIVAL STRATEGY

	ACTION	BY WHOM	WHEN
1.	To consider the findings of this report, discuss as appropriate; foremostly to determine the form of Artistic Direction for 2004	Board of Jazz Festival Board of Theatre	October 2003
2.	To convene the present Festival Board to consider re-visioning the Festival through strategic and change management, for operations	Board of Jazz Festival, Executive Director	November 2003
3.	To share the conclusions of this report with key partners	Arts Council of Wales, Welsh Assembly Government, Brecon Town Council, Powys CC, BBC	December 2003
4.	To advertise for an Artistic Director or search for Associate Director	Executive Director and Board recruitment subcommittee	December 2003
5.	To short list, interview and appoint an Artistic Director or Associate Director	Board of Jazz Festival, Executive Director and Arts Council assessor	January 2004
6.	Undertake market appraisal for the Brecon Jazz Festival	External Marketing Consultant	February 2004
7.	To clarify the objectives, identity, ambition, standards and management of the Festival, upon the appointment of new Artistic Director or Associate Director	Festival Chairman, Executive Director, Artistic Director	February 2004
8.	To create an Educational and Outreach policy	Executive Director, Artistic Director, Royal Welsh College of Music and Drama	March 2004
9.	To determine the 2004 Management Agreement between Festival and Theatre	Board Chairs, Executive Director, Financial Administrator	March 2004
10	To prepare a strategic five-year improvement plan; with costs and benefits	Executive Director, Artistic Director, Financial Administrator and Festival Board sub-committee	April 2004
11	To consider funding implications of new operations	Arts Council of Wales, Welsh Assembly Government, Powys CC, Brecon Town Council	May 2004
12	To finalise new service delivery agreement and revenue subsidy levels with partners	Festival Chairman, Executive Director	May 2004
13	To determine effective new monitoring and evaluation frameworks	Executive Director, Artistic Director, Financial Administrator	May 2004
14.	To monitor the Operations Plan	Executive Director, Financial Administrator	Ongoing

8. OUTLINE FESTIVAL PLANNING TIMETABLE FOR 2004		
Month: November	Comment	Responsibility
Begin application for grants	continuing	Executive Director
Review and resolve producing arrangements and contract Artistic Director/Associate Director for 2004		Chairman, Board and Executive Director
Draft management accounts for 2003 Festival		Financial Administrator
Consider consultant's report		Board of Directors of both companies
Desk research and visits to other festivals for strategic policy development and longer term artistic directorate-management arrangements	continuing	Executive Director, Chairman
Formalise new agreement for management services between TB and Festival		Executive Director, Chairmen
Month: December		
Report of 2003 Festival to Friends and newsletter about new artistic direction		Executive Director
Prepare individual giving and donation plan		Executive Director
Produce preliminary programme outline and budget		Artistic Director and Executive Director
Prepare marketing plan	continuing	Theatre Marketing Manager
Formal funding applications to local authorities and Arts Council of Wales		Executive Director
Update festival mailing list	continuing	Theatre Marketing Manager
Commission new 5 year Festival business plan		Executive Director
Commence major sponsor drive for 2004 and 2005	continuing	Executive Director
Prepare merchandising plan for 2004		Executive Director
Investigate overseas Jazz festivals	continuing	Executive Director
Board 'retreat' to consider long term artistic policy development		Chairman, Board and Executive Director
Month: January		
Preliminary letter and programme highlights to Friends and renewal notices		Artistic Director and Executive Director
Month: February		
Revise preliminary budgets to incorporate more accurate estimates		Executive Director

8. OUTLINE FESTIVAL PLANNING TIMETABLE FOR 2004		
Month: November	Comment	Responsibility
Book all venues		Executive Director and Financial Administrator
Reserve musicians' accommodation and apply for visas for overseas artists		Coordinator
Request quotes for following resources: hoist, chairs, portaloos, radiophones, AA signs, PCC signs		Coordinator
Request quotes for: sound, electricity, plumbing, first aid, refuse collection &c.		Coordinator
Technical services procurement quotes: lighting, stages &c		Coordinator
Negotiate media sponsorships		Executive Director
Continue sponsor contacts	continuing	Coordinator
Prepare annual poster brief and commission designer		Executive Director
Month: March		
Prepare application forms for and contact potential stall holders		Coordinator
Apply for road closure order		Coordinator
Confirm availability of chief stewards		Coordinator
Begin discussions with chief stewards		Coordinator
Liaise with Bath Ales		Coordinator
Programme Finalised		Artistic Director
Revised Programme Budget and Contracts for Artists		Executive Director and Financial Administrator
'Sell off' negotiations for international artists booked		Executive Director
Finalise marketing plan		Executive Director
Obtain publicity material from visiting musicians		Coordinator/Marketing
Arrange venue and prepare invite list for Festival launch, at Cardiff		Marketing
Contract Production Co-ordinator		Executive Director
Month: April		
Box Office requirements		Coordinator/Marketing
Apply for public entertainment licenses		Coordinator
Meet with Dyfed Powys Police		Coordinator
Compile list of accommodation available for festival-goers		Coordinator
Liaise with security firm		Coordinator
Print and distribute annual poster		Marketing
Final programme contracted		Executive Director

8. OUTLINE FESTIVAL PLANNING TIMETABLE FOR 2004		
Month: November	Comment	Responsibility
Obtain sponsors' logos		Marketing
Arrange mailing envelopes for brochure		Marketing
Prepare and print booking brochure		Executive Director, Marketing
Press conference and festival launch reception in Cardiff, with same day evening Friends launch and annual general meeting, at Brecon		Executive Director, Marketing
Friends' advance programme newsletter		Artistic Director, Executive Director, Marketing
Press kits and saturation media campaign; including artistic director and executive director media visits to London		Artistic Director, Executive Director, Marketing
Month: May		
Appoint extra box office staff		Marketing
Contact volunteers		Coordinator
Sell souvenir programme advertising		Marketing
Contact landowners for permission to site large signs		Coordinator
Liaise with PCC and Brecon Town Council re sponsors' reception		Coordinator
Liaise with Cantre Selyf re sponsors' hospitality		Coordinator, Marketing
Prepare sponsors, media and VIP tickets and reserve		Marketing
Liaise with sponsors		Marketing
Distribute booking brochure through mailing list and stock outlets		Marketing
Open advance postal and phone bookings to Friends		Marketing
Phone and postal bookings thereafter, to general public		Marketing
Month: June		
Open counter box office bookings to general public		Marketing
Prepare critics invitations to 2004 Festival		Marketing
Start stewarding rotas		Coordinator
Produce information for stewards		Coordinator
Liaise with canopy team		Coordinator
Meeting and liaison with volunteers, setting tasks		Coordinator
Meetings with Head of Stewarding		Coordinator

8. OUTLINE FESTIVAL PLANNING TIMETABLE FOR 2004		
Month: November	Comment	Responsibility
and chief stewards		
Check appropriate signage		Coordinator
Contract additional technical team		Coordinator
Contract sound, technical services and transport		Coordinator, Production Coordinator
Month: July		
Produce duty board members' roster		Coordinator
Finalise production schedule		Coordinator
Produce payments schedules		Financial Administrator
Convene multi agency chief steward meeting tow weeks before Festival		Coordinator
Finalise information for stewards		Coordinator
Organise musicians' hospitality		Coordinator
Continue stewarding rotas		Coordinator
Meetings with Head of Stewarding and Chief Stewards		Coordinator
Apply for bunting licence		Coordinator
Month: August		
Make video/DVD of 2004 Festival for future marketing and sponsorship presentations		Executive Director, Marketing
Ensure all venues comply with PELs		Coordinator
During Festival weekend: meet and farewell artists		Artistic Director, Executive Director
During Festival weekend: meet and farewell media and sponsors		Artistic Director, Executive Director
During Festival weekend: coordinate		Coordinator, Production Coordinator and Technical Team
Pay artists and ensure banking of all receipts		Financial Administrator
Month: September		
Consider artistic direction arrangements for 2005		Board, Executive Director
Draft accounts for 2004 Festival		Financial Administrator
Month: October		
Consider preliminary programme and budget outline for 2005		Executive Director, Financial Administrator

9. APPENDICES

9.1 Persons Consulted

Phil Clark	Artistic Director, Sherman Theatre, Cardiff; Former Board member, Brecon Jazz Festival Limited
Walter Dickie	Board member, Brecon International Festival of Jazz Limited; Former Director, Lloyds TSB Wales
Andrew Eagle	Director, Theatr Brycheiniog; Executive Director, Brecon International Festival of Jazz Limited
Tony Elston	Vice President and Board member, Brecon International Festival of Jazz Limited; Former Board member Brecon Jazz Festival Limited; founder of the Festival in 1984 Vice-Chairman, Brecon Guildhall Theatre Limited
Peter Norbury	Chairman, Theatr Brecon Guildhall Theatre Limited; Board member, Brecon International Festival of Jazz Limited
Clare Thomas	Director, Arts Council of Wales, Mid and West Wales Office
Miriam Ward	Operations Manager, Theatr Brycheiniog; Financial Administrator, Brecon International Festival of Jazz
Jed Williams	Artistic Director, Brecon International Festival of Jazz, 2003

9.2 Principal references examined

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The Author

PAUL ILES is an Edinburgh-based consultant, who has rendered independent advice and assistance on artistic and management policies to over thirty theatres, festivals and theatre companies since 1997. His work is grounded in previous jobs as manager of the Edinburgh Festival Theatre, the State Theatre Company at the Adelaide Festival Centre and the Nimrod Theatre Company of Sydney. He was assistant director for the 1988 Adelaide Festival, and has lectured in festival management at Queen Margaret University College, Edinburgh. He is a trustee of The Theatres Trust, associate director of the Georgian Theatre Royal at Richmond and holds research degrees of MPhil and MLitt from the University of Glasgow.