



# AUDIT OF SERVICES REQUIRED BY INDEPENDENT DANCE MANAGERS

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Commissioned by London Arts

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## 1. INTRODUCTION

This audit has been commissioned by the Arts Council of England's London regional office, London Arts, following the Independent Dance Managers Review by Nigel Hinds and Kathy O'Brien, published in December 2002. The aim of the audit is to address a key recommendation of the Review

*"... to undertake an exercise to identify the scale of the sector's needs ... and the potential for outsourcing"*

and to make recommendations on potential models for outsourcing services in the future that draw on and/or develop existing resources.

The audit focuses on the independent dance management sector but also refers to fixed-term funded clients of the Arts Council that tour on the small and middle scale.

The report aims to serve the needs of Arts Council England in its future decision making on support for the independent dance management sector, the Independent Dance Managers Network, and all those who support the sector in England.

## 2. METHODOLOGY

The brief for the audit is attached as Appendix 1

In undertaking the audit:

- A self-completion questionnaire was devised and circulated to 18 independent dance managers and 9 small and middle scale dance companies, as identified by London Arts, and the responses were analysed. Responses were received from 16 independent dance managers, 6 small and middle scale dance company and one dance festival involved in middle scale touring. (Appendix 2).
- Performing arts managers working in other sectors were interviewed;
- Providers of services to the dance and arts sector were interviewed;
- Desk research referring to websites, handbooks and other documents was undertaken;
- A discussion was held with members of the Independent Dance Managers Network at one of their regular meetings;
- Personal experience was used drawn from nearly twenty years' work in arts management.

For the purposes of this report the term “dance managers” refers to Independent Dance Managers typically managing a portfolio of clients or projects. The term “companies” refers to dance companies typically with one full-time manager.

A list of the people consulted and documents researched is attached as Appendix 3.

### 3. EXECUTIVE SUMMARY

Arts Council England has indicated its desire to develop the infrastructure for independent dance managers. Outsourcing has many benefits. Among them, it enables dance managers to free up their time and that of their staff as a way to reach their full potential and reduce work-place stress. Arts Council England should encourage this. At the same time, the sector should ensure that outsourcing services does not lead to redundancies or a reduction in in-house training provision.

Specialist services in different fields are already available for use by independent dance managers in servicing clients’ needs. Some routine and skilled industry-specific services are less available. **Dance managers should be encouraged to access the existing provision. At the same time, Arts Council England should consider a targeted programme to support the development of new service providers in the fields of accommodation and travel booking, and technical support (Recommendation 1)**

Dance managers feel they do not know where to source service providers. There is no industry database. Services are generally accessed by word of mouth or personal recommendation. **Arts Council England should consider funding an on-line database service for dance managers and self-managed artists (Recommendation 2).**

Dance Managers have greater purchase power as a group than individually, and should consider negotiating as a group to secure better deals with service providers they all use, such as IT engineers. **Arts Council England should explore with managers seed-funding for a retained contract (Recommendation 3).**

To work effectively, outsourcing needs to happen within an atmosphere of trust and understanding. **Arts Council England should explore with dance managers ways of developing (eg through training or public relations) a greater understanding of the service providers’ role (Recommendation 4).**

## 4. THE CURRENT SITUATION

### 4.1 THE SERVICE PROVISION ALREADY AVAILABLE FOR INDEPENDENT DANCE MANAGERS

The existing service provision available for independent dance managers falls into three distinct groups:

**Small-medium sized organisations** offer specialist services directed at arts organisations and/or the wider business community. These organisations are essentially commercial although some, particularly those directed at arts organisations, and those that work extensively within it, have rates or remuneration appropriate to small business operation. Those directed at arts organisations include marketing agencies (eg, Guy Chapman Associates), distribution agencies (eg, London Calling and Impact), fundraisers (eg Craigmyle & Sons) and consultancy firms specialising in strategic planning, organisational development, feasibility studies and planning capital projects (eg AEA Consulting). Those that work within the wider business community would include accountancy firms (eg Dubb & Co and Breckmans) who offer book-keeping as well as an audit service, lawyers (eg Harbottle & Lewis), insurance brokers (eg Gordon & Co, Walton & Parkinson), travel agents (eg, Network Business Travel Service), web site designers and IT problem solvers. Some larger commercial organisations have created brands to deal with the arts market, for example, HB Arts (a division of Hotel Brokers), Performers (part of Wrightsure Services insurance brokers).

**Voluntary Sector organisations** with charitable status specifically directed at the arts or voluntary sector form the next group. These are relatively small in number, eg, Interchange Legal Advisory Service, offering legal advice on matters to do with setting up a company, obtaining charitable status, employment legislation and so forth.

**Individuals** offer a range of specialist services to the dance sector and wider arts industry. Services provided in this way are marketing (eg Martha Oakes PR), press (Tony Shepherd), project management (Mairead Turner), fundraising (Claire Cooper), strategic planning (Rachel Gibson), graphic design (Christophe Gowans), photography (Hugo Glendinning) and production management (Steve Wald). Among this group are freelance technicians forming the largest single group of service providers of this type. Also included in this group are the independent dance managers themselves. Some service providers employ one or possibly two staff. Others work totally independently, have formed partnerships or will sub-contract further (eg Simon Byford, production manager).

Case studies of service providers are given in Appendix 4.

## **4.2 SERVICES ALREADY USED BY INDEPENDENT DANCE MANAGERS**

Through the evidence of the questionnaires, all three groups of service providers – if not all services - are already used by independent dance managers.

All the respondents to the independent dance manager's questionnaire were involved in some kind of outsourcing. The great majority of people outsourced three or more services. The greatest number of services outsourced by one person was seven, and the least was one.

Managers were most likely to outsource specialist services such as accountancy (10 respondents), IT problem solving (8) and graphic design (6). The highest spend (£31,800) was on Production/Technical Managers, although only five of the

respondents were involved in this kind of outsourcing. Five respondents outsourced press relations but only two people outsourced marketing (one to devise a marketing strategy, one to deliver).

None of the managers outsourced any of the tasks most commonly associated with being the province of the arts manager, suggesting that all the managers took these on board as their proper role:

Artist career development  
Booking accommodation and travel  
Tour booking  
Developing projects  
Fundraising  
General office administration  
Tour management  
Managing premises  
Board/constitution  
Strategic Planning.

Other services that were not outsourced at all were:

Delivering education  
Market research.

There was no obvious correlation between the number of services outsourced or the amount spent and the financial turnover of the client base. Neither was there any obvious correlation between the number of clients managed nor number of staff employed and outsourced services. Either there was some more complex correlation in process or, more likely, the matter of outsourcing is down to personal choice.

In the great majority of cases, respondents to the questionnaires used either personal recommendation or word of mouth to source the services they subcontract. One person used Yellow Pages, one person used the Internet and one person was approached by the service provider (rather than the other way round). In no instance was a specialist or industry-based directory used. There is currently no centralised database of service providers to the dance sector, available either free or at a price. The most up to date data for the dance sector is available from Artist Development but is limited to data on companies, artists, press, organisations and funders.

#### **4.3 ATTITUDES OF INDEPENDENT DANCE MANAGERS TO OUTSOURCING**

In servicing the needs of artists, Independent Dance Managers have essentially three options:

- Do the work themselves
- Employ staff
- Sub-contract different elements to specialists

When it comes to delegating tasks, managers have an acute sense of their own strengths and weaknesses, likes and dislikes, both in terms of what they delegate and how. In the questionnaires, the following pros and cons were given for and against outsourcing:

#### PROS

- Greater expertise and/or fresh ideas can be acquired;
- There is no need to maintain an infrastructure – buy in as and when needed
- It frees up management time so that it can be spent more productively or on more interesting or creative tasks;
- There is minimal commitment involved (contracts are less onerous in the long term);
- The outsourcer has the ability to shop around for exactly the right service provider at the right level of expertise/professionalism;
- Managers can learn from working alongside a sub-contractor and models of good practice;
- It reduces the need to train in house in particular area/skill.

#### CONS

- Potential lack of accountability/live trouble-shooting;
- Potential lack of understanding of particular artists/artistic needs;
- Potential lack of control;
- Potential for poor communication;
- Sourcing and briefing candidates is difficult/time-consuming.

In addition to providing information on the advantages and disadvantages of outsourcing, respondents to the questionnaires were also asked what were the reasons they did not outsource more. Not surprisingly, most people cited “insufficient funds” (presumably the work is done for free in house?). “Not knowing whom to use” or “Lack of available service providers” were also common reasons given.

Many managers were keenly aware of the advantages and disadvantages of outsourcing. Others, who were vague in the answers they gave on the questionnaire, may lack experience. Some managers talked about not “trusting” the potential service provider. Others felt outsourcing was not cost-effective (managers were generally divided on this issue).

From their intentions, respondents to the questionnaire appear sympathetic to outsourcing. All the managers said that they intend to continue to outsource all the services they currently sub-contract (the specialist services such as accountancy, PR and technical/production management). Only one said they would prefer to undertake in house one of the services they currently outsource (press). Generally respondents were keen to outsource in new areas in the future. Some of these are specialised:

- Book-keeping
- Fundraising
- Visa applications

- Web site design
- Booking tours
- Strategic planning
- Career development
- Project development
- Project management

There was no overwhelming preference for particular services to be outsourced in the future, except in one instance; seven respondents chose booking accommodation and travel as something they would like to outsource. There is generally a sense of dissatisfaction with this element of the dance manager's job; it is often seen as tiresome, mundane and a poor use of their time. According to the survey, managers are spending between 5 hours per year and 400 hours per year (a vast range) delivering these services in house on a regular basis. In the past, managers have trained up relatively inexperienced people to do these mundane tasks, either as part of a dedicated training programme or to satisfy a particular job spec. The problems in retaining such staff have been described in the Independent Dance Managers Review. Other services that "scored" relatively highly were marketing and press.

Not all the respondents made it clear how much time they spent currently doing in house the tasks they would like to outsource in the future. However, where this was stated, it was clear that a considerable amount of time could be saved in some cases. In one case, where a respondent with two full time staff would like to outsource both accommodation and travel, an average of 16 hours staff time each week would be freed up.

The survey found that in two cases a change to subcontracting would mean a reduction in paid hours or fewer staff. This is possibly over-optimistic given the level of time it is predicted that outsourcing might save (see accommodation and travel example given above). Many more people felt that staff would be affected in other ways. A number of respondents pointed out that the freed-up time might be used in other forms of management that were possibly more pro-active or developmental in nature. It was also felt that respondents and their staff would be less stressed as a result of outsourcing.

The questionnaires provided six potential models for meeting the service needs of the dance sector. Dance managers were asked to score them as follows:

- 1= I would not be at all interested*
- 2= I would be quite interested in using this type of service*
- 3= I would be definitely interested in using this type of service*
- 4= I would definitely use this service (subject to terms and conditions)*

The scores were:

- 1. Directory of pooled/shared contacts.** Survey score: 48 out of 64.
- 2. E-list problem shop** Survey score: 42 out of 64

**3. A centralised agency** Survey score: 35 out of 64

**4. Skill Swapping within a network** Survey score: 38 out of 64

**5. Flying Doctor (eg IT problem solver, Technical Adviser)** Survey score: 46 out of 64

**6. Clearing House for last minute booking of rehearsal space** Survey score: 56 out of 64.

The 16 independent dance managers who completed the questionnaire were then asked how they would score a Technical Management Agency. They were asked to score in the same way as they had scored the initial six models. 13 managers responded.

**7. Technical Management Agency** Survey score: 36 out of 52

#### **4.4 MODELS OF GOOD PRACTICE FOR PROVISION OF THESE SERVICES IN OTHER SECTORS**

The research found little in the way of models of good practice within other artform sectors, other than those listed among the Case Studies (Appendix 4).

Two websites aimed at professional visual artists and would-be professional visual artists provide possible models for a website which could be of use to dance artists and dance managers alike. They are [www.artquest.org.uk](http://www.artquest.org.uk) and [www.anweb.co.uk](http://www.anweb.co.uk). Both provide practical advice to visual artists on setting up as professionals (space, contracts, services, insurance, etc.). The Artquest site has a smallish database included. The Anweb site has a magazine-type feel to it and is easier to digest.

#### **4.5 THE SERVICE NEEDS OF THE SMALL TO MIDDLE SCALE COMPANIES**

Current patterns of outsourcing within small to middle scale companies are broadly in line with those of the independent management sector. Small and middle scale companies are equally likely, for example, to outsource similar specialist areas, and they spend roughly the same percentage of their turnover in this way. They also plan to continue outsourcing these same specialists.

Future patterns of outsourcing suggested a much lower requirement for new services to be outsourced. They did not, for example, show a desire to outsource travel and accommodation in the future (although one organisation already spent £50,000 per year on accommodation). They had similar attitudes towards outsourcing as their independent counterparts, but were less likely to use the “future models” scenarios put forward. They did, however, show similar preferences and were in favour of using the database and rehearsal room clearing-house.

## 5. KEY ISSUES

The research has highlighted the key issues that surround the service needs of independent dance managers. Wherever possible, Arts Council England should work closely with the Independent Dance Managers Network to address these issues and implement the recommendations that follow.

### 5.1 THE NEED FOR INDUSTRY-BASED SERVICE PROVIDERS

More industry-based service providers are required in the field of accommodation and travel booking for touring artists.

- There is a high level of dissatisfaction among dance managers undertaking this work in house.
- Managers spend up to 8% of staff time organising travel and accommodation in house.
- Managers say that they would like to outsource accommodation and travel but do not do so at present, saying that existing commercial bookers require lengthy briefings and larger budgets than many clients can afford.
- An industry-based service provider combining flexibility, knowledge of the sector and affordability would fill a gap in the market.

A more cohesive and efficient service providing technical management staff should be developed.

- With a few notable exceptions, managers and their staff possess little in the way of technical expertise in house.
- Managers spend a lot of time sourcing people to work in technical posts and dealing with problems caused through using inexperienced people.
- There are difficulties in retaining experienced technical staff.
- Managers spend more of their clients' money in this field than on any single other outsourced service.
- Managers have expressed an interest in using a one-stop shop for technical services and indicated a willingness to pay a premium for such a service.

**Recommendation 1:** Arts Council England should consider a targeted programme to support the development of new service providers in the fields of accommodation and travel booking, and technical support.

### **Recommended Model 1:**

Funds should be provided for **a traineeship in organising accommodation and travel** to provide a booking service for the independent dance sector. The service would aim to be efficient, flexible and affordable, with users paying either a premium or commission as a management fee. The host could be an independent dance manager or agency. They would provide training and management and would market the service to the sector. Particular care should be taken with recruiting the trainee. Recruitment advertising might be placed in the travel agency trade press, for instance, rather than in the arts professional media. It is anticipated that, after an initial two-year period, the operation would be self-sufficient.

Arts Council England and Independent Dance Managers Network should consider linking the traineeship to the on-going training programme for dance company managers; if so, ACE and IDMN should take on board the current process of standardisation of training and seek to make an exception with this traineeship.

Suggested cost: £15,000 per annum for two years

### **Recommended Model 2:**

**Technical Management Agency** would provide dance managers, companies and self-managed artists with:

technicians of suitable professional quality  
equipment for hire (dance floors, lighting, etc. available from companies)  
production management  
advice on feasibility of projects (eg for particular locations)

The Technical Management Agency would also contribute to the development of the infrastructure for theatre technicians in the dance sector, build awareness of Health & Safety in the theatre workspace, encourage greater job stability, and establish better working conditions for technicians.

Suggested cost: £20,000 per annum for two years

## **5.2 THE NEED FOR A CENTRAL DATABASE WITH FACILITY TO CLEAR UNUSED REHEARSAL SPACE**

Dance Managers need to know where to source the services they require. Many have a wealth of knowledge accumulated over a long period working in the field. Others who are less experienced may not. At present there is no industry-based database of service providers.

- Managers mostly find out about service providers by word of mouth or personal recommendation.

- In the survey several respondents gave as their reasons for not outsourcing more not knowing which service provider to use or not knowing where to find about them.
- There is high demand among managers for both a central database and a clearing house for last minute rehearsal space bookings.
- This high demand is also reflected amongst the companies.

**Recommendation 2:** Arts Council England should consider funding an on-line database service for dance managers, companies and self-managed artists.

### **Recommended Model 3:**

**On-line database service** for dance managers, companies and self-managed artists with:

- data of service providers;
- data supported by recommendation and/or reports from members of Dance UK and IDMN, giving the database credibility in the sector;
- a link to the Dance UK and Independent Dance Managers Network e-groups to gain further information through “problem shop”;
- a notice board for last minute rehearsal space slots posted by the space providers.

The database could be a stand-alone Internet site. It should be linked to two existing sites, and could be housed within either of them:

[www.theplace.org.uk](http://www.theplace.org.uk). Artist Development at The Place is keen to be involved and is currently thinking about database development.

[www.londondance.com](http://www.londondance.com). Also keen to be involved. In becoming more audience friendly in recent times, the “services” element of this popular website has been lost, but could be re-instated.

Links should also be made to two sites under development through CreativePeople, the Arts Council’s Continuing Professional Development Initiative.

The knowledge services in arts management site (currently in embryo at [www.ksam.org.uk](http://www.ksam.org.uk)) provides information and articles on all aspects of arts management from entry level to academic research level.

The professional development site for dancers, [www.workindance.com](http://www.workindance.com), is being developed by Artist Development, Foundation for Community Dance and Dance UK.

Suggested cost: £30,000 to set up, £10,000 per annum thereafter.

### **5.3 THE PURCHASE POTENTIAL OF DANCE MANAGERS WITHIN A NETWORK OR GROUP**

Dance Managers have limited resources and need to outsource at economic rates. They have greater purchase power as a group than they do as individuals and should consider negotiating as a group to secure better deals with service providers they all use, such as IT engineers.

**Recommendation 3.** Arts Council England should explore with managers seed-funding for a retained contract.

#### **Recommended Model 4:**

##### **Retained contract**

As an initial trial, the retained contract could be applied to the provision of IT services. Pooling the contacts of their members, the Independent Dance Managers Network could invite IT engineers to tender to provide services to the membership for twelve months, renewable after one year. The candidates would be selected by IDMN who would then issue and manage the initial contract. The initial contract would guarantee a minimum level of business to the contractor in return for their commitment to respond swiftly to members' requests for IT services. A minimum response time would need to be agreed. Whilst the seed-funding is available, IDMN members would be encouraged to use the IT engineer by the low cost of the service (payable as and when the service is used) and the speedy response time. When the initial contract is concluded, it would be hoped that the IT engineer would be retained for a further twelve months. Though the cost to users would be higher than in the initial twelve months' period, it would still be attractive economically because the market for the engineer would be established.

If the trial proved successful the model could be adapted to other services regularly required of dance managers, eg, book-keeping.

Suggested cost: £5000 per retainer (to include management fee)

### **5.4 THE NEED FOR GREATER UNDERSTANDING BETWEEN SERVICE PROVIDERS AND USERS**

To work effectively, outsourcing should have a basis of trust and understanding. Currently this is not always the case:

- Dance Managers may look upon outsourcing with apprehension.
- They may be untrusting of the service providers and uncertain of the cost-effectiveness of outsourcing.
- They encounter difficulties with briefing service providers.

**Recommendation 4:** Arts Council England should explore with dance managers ways of developing (eg, through existing training provision or public relations) a greater understanding of the service providers' role.

Suggested cost: £1000

## 6 RECOMMENDED TIMEFRAME

In recommending a timeframe for implementing the recommendations, the report is taking into account:

- The need for intervention
- The potential impact
- The ease of implementation

Arts Council England should:

Within one year: Implement Recommendation 1 and undertake feasibility study for and implementation of Recommendation 2

Within two years: Implement Recommendations 3 and 4.

# APPENDICES

## Appendix 1

An audit of services required by independent dance managers with recommendations for models to provide those services

### Background

The Independent Dance Managers Review, by Nigel Hinds and Kathy O'Brien, commissioned by London Arts, completed in October 2002, reveals a range of needs of the sector. The aim of this research is to address a key recommendation of the report:

*...to undertake an exercise to identify the scale of the sector's needs....and the potential for outsourcing.*

*Managers commented on the amount of time they have to spend in booking services for tours and productions, particularly rehearsal space, travel and accommodation.*

*A comparison with the music sector reveals specialised travel agents who arrange international and UK tours for musicians and their equipment. These are listed in the 'Music Weekly Directory' (the music industry equivalent of the White Book). The travel agencies will also arrange travel for other sectors, including individuals. Some agencies will book accommodation, others not.*

Independent Dance Managers Review, 2002

The report revealed a need for a service that could be used by independent dance managers to enable specific tasks to be subcontracted. Service needs already identified include: tour bookings, including venue bookings and travel and accommodation bookings; marketing; IT doctor; book-keeping services and translations.

This research, led by London Arts, will inform the arts funding system in its future decision making about how to support the sector. It is hoped that the findings of this research will provide recommendations on potential models for outsourcing services that draw on and/or develop existing resources.

### Objectives

1. To undertake desk research to find out about models of practice for outsourcing support for arts managers, in and out of the dance sector, such as for instance, the Musician's Diary run by the Music Dept at the South Bank, [www.artquest.org.uk](http://www.artquest.org.uk) and [www.workindance.com](http://www.workindance.com).
2. To review the scale of the needs of independent dance managers requiring services, by interviewing approximately 15 independent dance managers and 10 small to middle scale companies, as identified by London Arts, and through analysis and interpretation of the above interviews, to identify what the priorities are for services.

3. Through analysis and interpretation of the above interviews, to provide options for how these needs can be met, by drawing on and/or developing existing resources. Possible outcomes might include for instance, centralised outsourcing, training needs, pooling/sharing contacts, e-list problem shop.

### **Key Questions**

- What, if any, service provision is already available for independent dance managers?
- What, if any, service provision is already used by independent dance managers?
- What are the service needs of independent dance managers?
- Are there models of good practice for provision of these services in other sectors?
- How can the service needs of the independent dance sector be met?
- Are the service needs of the small to middle scale companies compatible with the needs of independent dance managers?

### **Scope of project**

The researcher will be provided with contact details of approximately 15 freelance independent dance managers, 10 small to middle scale dance companies and 10 addition individuals/agencies who should be consulted as part of this research. The dance managers and companies will be based in London and/or working with London-based professional dance companies.

Before the research is commenced the researcher should provide a plan for the research including methodology and a draft of the questionnaire.

#### **Expected Outputs and reporting requirements**

The researcher will be expected to produce:

1. Plan for the research including methodology and a draft of the interview questionnaire by 20 January 2003.
2. Interim report, by 21 February 2003, providing an indication of preliminary findings and an outline direction the report is likely to take
3. Draft final report, by 7 March 2003, responding to each of the objectives of the brief including detailed recommendations built on the evidence presented.

### **Management of the research**

The research will be managed by Christina Birt (Dance Officer) at London Arts.

### Working Practices

The researcher will be responsible for coordinating and administering all aspects of the study.

On completion of the project, a draft final report should be supplied to the Arts Council London office for discussion and approval. The document should be supplied by electronic format (Word 97 and PDF) for distribution as hard copy and to ensure the web publication can occur and large print and Braille versions can be supplied.

### Timescale and Budget

It is planned that the researcher be appointed in January 2003. Final reports should be completed no later 7 March 2003.

The fee for this work is £1,500 including VAT + £67 expenses. Payment will be by submission of an invoice to the Dance Unit, London Arts, in respect of the special conditions outlined in the offer letter, on completion of the report.

#### Essential skills and experience required

- Understanding the role of an independent dance manager.
- Knowledge of the needs of independent dance managers in London.
- Previous experience of developing research methodologies.
- Previous experience of data collection, analysis and interpretation skills (qualitative and quantitative).
- Previous project management experience

## Appendix 2a

### Audit of services required by independent dance managers 2003

#### QUESTIONNAIRE

**PLEASE COMPLETE AND RETURN BY 10 February 2003**

#### **SECTION ONE: PERSONAL DETAILS**

Name

1.2 Contact details

Phone

Email

***We are asking for personal details in the interests of accurate reporting. By doing so, we can avoid inflating data by, for example, including the responses of two members of the same organisation or by including the responses of a freelance dance company manager and the dance company he/she manages. All data will be aggregated and will not be traceable to you.***

#### **SECTION TWO: ABOUT YOU AND YOUR ORGANISATION**

2.1 How would you describe your professional role?

- dance company manager       Other (please state)
- full time       part time
- freelance       an employee

2.2 How many clients do you have?

2.3 Give the financial turnover of your total client portfolio in the twelve months to 31 March 2003 (an approximate estimate is acceptable)?

2.4 Does this figure reflect clients who are fixed term funded clients of the Arts Council of England?

- yes       no

**If so, please state which client .....**

2.5 How many staff do you/your organisation employ? (do not include staff employed by clients unless they are under your sole supervision).

2.6 Please give job titles of the staff you employ and state whether they are full time, part time or freelance.

2.7 How many hours a week do you and each staff member work?

Yourself .....

- less than 10       10-20 hrs       20-30 hrs
- 30-40 hrs       40-50 hrs       50-60 hrs
- above 60 hrs

Your staff (give  
Job title)

.....

- less than 10                       10-20 hrs                       20-30 hrs  
 30-40 hrs                       40-50 hrs                       50-60 hrs  
 above 60 hrs

.....

- less than 10                       10-20 hrs                       20-30 hrs  
 30-40 hrs                       40-50 hrs                       50-60 hrs  
 above 60 hrs

**SECTION THREE. SERVICES YOU CURRENTLY OUTSOURCE**

**Outsourcing means sub-contracting services to others (individuals or Organisations).**

3.1 What services do you currently outsource (if any) on behalf of yourself, your Organisation or your clients?

3.1.1 Please tick the first box against the services you have outsourced in the year ending 31 March 2003.

3.1.2 Please state the name of the service provider in each case.

3.1.3 Please state how much you are spending on each service in the current financial year (ending 31 March 2003).

3.1.4 Please tick the second box if *IN PRINCIPLE*, you will continue to outsource these services in the future (with or without the same service provider).

<b>Service used in 2002/03</b>	<b>Service Provider</b>	<b>Annual Spend (£)</b>	<b>Will use again ?</b>
<input type="checkbox"/> <b>artist career development</b>	.....	.....	<input type="checkbox"/>
<input type="checkbox"/> <b>accountancy</b>	.....	.....	<input type="checkbox"/>
<input type="checkbox"/> <b>book keeping</b>	.....	.....	<input type="checkbox"/>
<input type="checkbox"/> <b>booking accommodation*</b>	.....	.....	<input type="checkbox"/>
<input type="checkbox"/> <b>booking tours</b>	.....	.....	<input type="checkbox"/>
<input type="checkbox"/> <b>booking travel*</b>	.....	.....	<input type="checkbox"/>
<input type="checkbox"/> <b>delivering education</b>	.....	.....	<input type="checkbox"/>
<input type="checkbox"/> <b>delivering marketing</b>	.....	.....	<input type="checkbox"/>
<input type="checkbox"/> <b>designing publicity</b>	.....	.....	<input type="checkbox"/>

- devising education strategy** .....
- devising marketing strategy** .....
- developing projects** .....
- distributing publicity** .....
- fundraising** .....
- general office admin.** .....
- I.T. problem solving** .....
- managing tours** .....
- managing premises** .....
- managing projects** .....
- market research** .....
- press relations** .....
- production/technical  
management** .....
- setting up Board/constitution**.....
- strategic planning** .....
- translations** .....
- visa applications** .....
- other (please state)** .....
- .....
- .....
- .....

*\*please do not include regular travel agents here. We are interested to hear about using agents who take on "responsibility" for booking travel according to a brief, rather than agents who book specific journeys under your direct instruction.*

- 3.2 If the services used in 2002/03 is not representative of a typical year, please explain:
- 3.3 How did you source these services? (please tick)

- specialist directory (state which)
- general directory (eg Yellow Page) (please state)
- Internet (state which web-sites if possible)
- personal recommendation
- word of mouth
- other method (please state)

3.4 Of the services you have outsourced in 2002/03, which would you prefer to do yourself or with your current staffing if you had the skills in house?

**SECTION FOUR. SERVICES YOU WOULD LIKE TO OUTSOURCE IN THE FUTURE**

4.1 Which services would like to outsource in the future?

4.1.1 *Please tick the services you would like to outsource in the future (but don't at present).*

4.1.2 *If you undertake them in house at present, please state approximately how much time you and your staff are spending on each service in the current financial year.*

	Time spent	per week/month/year (please state which)
<input type="checkbox"/> artist career development .....	.....	.....
<input type="checkbox"/> accountancy .....	.....	.....
<input type="checkbox"/> book keeping .....	.....	.....
<input type="checkbox"/> booking accommodation* .....	.....	.....
<input type="checkbox"/> booking tours .....	.....	.....
<input type="checkbox"/> booking travel* .....	.....	.....
<input type="checkbox"/> delivering education .....	.....	.....
<input type="checkbox"/> delivering marketing .....	.....	.....
<input type="checkbox"/> designing publicity .....	.....	.....
<input type="checkbox"/> devising education strategy .....	.....	.....
<input type="checkbox"/> devising marketing strategy .....	.....	.....

- developing projects** .....
- distributing publicity** .....
- fundraising** .....
- general office admin.** .....
- I.T. problem solving** .....
- managing tours** .....
- managing premises** .....
- managing projects** .....
- market research** .....
- press relations** .....
- production/technical management** .....
- setting up Board/constitution.....** .....
- strategic planning** .....
- translations** .....
- visa applications** .....
- other (please state)** .....

4.1 How regularly are these services delivered in house (if applicable)?

Please tick which service(s)

- every day** .....
- 1-2 times each week** .....
- 1-2 times each month** .....
- 3-6 times each year** .....
- 1-2 times each year** .....
- less often** .....

4.3 Is there anything that prevents you outsourcing services more? If so, what?

4.2 If you were to outsource more, how would your current staff structure be affected?

#### SECTION FIVE. YOUR VIEW

5.1 What advantages and disadvantages do you see in outsourcing compared to undertaking work in house?

5.2 Given unlimited resources, what would be your ideal scenario in terms of outsourcing?

5.3 How do you like the idea of using the following. Please grade from 1-4

*1= I would not be at interested*

*2= I would be quite interested in using this type of service*

*3= I would be definitely interested in using this type of service*

*4= I would definitely use this service (subject to terms and conditions)*

- directory of pooled/shared contacts**
- e-list problem shop**
- centralised agency**
- skill swapping between members of your network**
- “flying doctor” (eg, IT problem solver, Technical Adviser)**
- rehearsal room clearing house for last minute bookings**

**Please complete and return this form by 10 February. Return to Sarah Trist, 14 Glenthorne Road, Kingston upon Thames KT1 2UB. Or email to [trist@supanet.com](mailto:trist@supanet.com)**

Thank you for taking the time to complete this form. *Please note, your comments will be confidential and all data will be aggregated and will not be traceable to you.*

## Appendix 2b

### Audit of services required by small and middle scale dance companies 2003

#### QUESTIONNAIRE

**PLEASE COMPLETE AND RETURN BY 10 February 2003**

#### SECTION ONE: PERSONAL DETAILS

1.1 Name

1.2 Contact details

Phone

Email

*We are asking for personal details in the interests of accurate reporting. By doing so, we can avoid inflating figures by, for example, including the responses of two members of the same organisation or by including the responses of a freelance dance company manager and the dance company he/she manages. All data will be aggregated and will not be traceable to you.*

#### SECTION TWO: ABOUT YOUR ORGANISATION

2.1 Please describe your Organisation:

2.2 Do you work predominantly at the small or middle scale? (please tick)

small scale

middle scale

mixture

2.3 Please give your annual turnover to 31 March 2003.

2.4 Please describe how many projects/productions and performances your Organisation undertakes each year on average

#### Projects

1-2

3-4

5 or more

#### Performances

1-10

11-20

21-30

31 or more

#### Workshops

1-10

11-20

21-30

31 or more

2.5 Please give job titles of the non performing staff your Organisation employs and state whether they are full time, part time or freelance. Remember to include yourself!

2.6 How many hours a week do you and each staff member work?

**Yourself** .....

- less than 10 hrs       10-20 hrs       20-30 hrs
- 30-40 hrs       40-50 hrs       50-60 hrs
- above 60 hrs

Your staff (give Job title)

.....

- less than 10 hrs       10-20 hrs       20-30 hrs
- 30-40 hrs       40-50 hrs       50-60 hrs
- above 60 hrs

**SECTION THREE. SERVICES YOU CURRENTLY OUTSOURCE**

**Outsourcing means sub-contracting services to others (individuals or Organisations).**

3.2 What services do you currently outsource (if any) on behalf of your Organisation?

3.2.1 Please tick the first box against the services you have outsourced in the year ending 31 March 2003.

3.2.2 Please state the name of the service provider in each case.

3.2.3 Please state how much you are spending on each service in the current financial year (ending 31 March 2003).

3.2.4 Please tick the second box if *IN PRINCIPLE*, you will continue to outsource these services in the future (with or without the same service provider).

<b>Service used in 2002/03</b>	<b>Service Provider</b>	<b>Annual Spend (£)</b>	<b>Will use again ?</b>
<input type="checkbox"/> artist career development .....	.....	.....	<input type="checkbox"/>
<input type="checkbox"/> accountancy .....	.....	.....	<input type="checkbox"/>
<input type="checkbox"/> book keeping .....	.....	.....	<input type="checkbox"/>
<input type="checkbox"/> booking accommodation* .....	.....	.....	<input type="checkbox"/>
<input type="checkbox"/> booking tours .....	.....	.....	<input type="checkbox"/>
<input type="checkbox"/> booking travel* .....	.....	.....	<input type="checkbox"/>
<input type="checkbox"/> delivering education .....	.....	.....	<input type="checkbox"/>



3.5 If the services used in 2002/03 is not representative of a typical year, please explain:

3.6 How did you source these services? (please tick)

- specialist directory (state which)
- general directory (eg Yellow Page) (please state)
- Internet (state which web-sites if possible)
- personal recommendation
- word of mouth
- other method (please state)

3.7 Of the services you have outsourced in 2002/03, which would you prefer to do yourself or with your current staffing if you had the skills in house?

**SECTION FOUR. SERVICES YOU WOULD LIKE TO OUTSOURCE IN THE FUTURE**

4.1 Which services would like to outsource in the future?

4.1.3 Please tick the services you would like to outsource in the future (but don't at present).

4.1.4 If you undertake them in house at present, please state approximately how much time you and your staff are spending on each service in the current financial year.

	Time spent	per week/month/year (please state which)
<input type="checkbox"/> artist career development .....	.....	.....
<input type="checkbox"/> accountancy .....	.....	.....
<input type="checkbox"/> book keeping .....	.....	.....
<input type="checkbox"/> booking accommodation* .....	.....	.....
<input type="checkbox"/> booking tours .....	.....	.....
<input type="checkbox"/> booking travel* .....	.....	.....
<input type="checkbox"/> delivering education .....	.....	.....
<input type="checkbox"/> delivering marketing .....	.....	.....
<input type="checkbox"/> designing publicity .....	.....	.....
<input type="checkbox"/> devising education strategy .....	.....	.....

- devising marketing strategy** .....
- developing projects** .....
- distributing publicity** .....
- fundraising** .....
- general office admin.** .....
- I.T. problem solving** .....
- managing tours** .....
- managing premises** .....
- managing projects** .....
- market research** .....
- press relations** .....
- production/technical management** .....
- setting up Board/constitution** .....
- strategic planning** .....
- translations** .....
- visa applications** .....
- other (please state)** .....
- .....
- .....
- .....

4.3 How regularly are these services delivered in house (if applicable)?

- Please tick which service(s)
- every day** .....
  - 1-2 times each week** .....
  - 1-2 times each month** .....

- 3-6 times each year** .....
- 1-2 times each year** .....
- less often** .....

4.3 Is there anything that prevents you outsourcing services more? If so, what?  
 4.4 If you were to outsource more, how would your current staff structure be affected?

**SECTION FIVE. YOUR VIEW**

- 5.2 What advantages and disadvantages do you see in outsourcing compared to undertaking work in house?
- 5.2 Given unlimited resources, what would be your ideal scenario in terms of outsourcing?
- 5.3 How do you like the idea of using the following. Please grade from 1-4

- 1= I would not be at interested*
- 2= I would be quite interested in using this type of service*
- 3= I would be definitely interested in using this type of service*
- 4= I would definitely use this service (subject to terms and conditions)*

- directory of pooled/shared contacts**
- e-list problem shop**
- centralised agency**
- skill swapping between members of your network**
- “flying doctor” (eg, IT problem solver, Technical Adviser)**
- rehearsal room clearing house for last minute bookings**

**Please complete and return this form by 10 February. Return to Sarah Trist, 14 Glenthorne Road, Kingston upon Thames KT1 2UB. Or email to [trist@supanet.com](mailto:trist@supanet.com)**

Thank you for taking the time to complete this form. *Please note, your comments will be confidential and all data will be aggregated and will not be traceable to you.*

## Appendix 3

Organisations and individuals consulted for this report.

### INDEPENDENT DANCE MANAGERS working in small and middle scale

Kerry Andrews  
Farooq Chaudhry  
Charlotte Cunningham  
Shaun Dawson  
June Gamble  
Nigel Hinds  
Colin Marsh  
Judi McCartney  
Donna Meierdierks  
Rajpal Pardesi  
Isabel Tamen  
Tim Tubbs  
Mairead Turner  
Gwen van Spijk  
(Sarah Trist also completed questionnaire)

### DANCE COMPANIES touring in small and middle scale

Arc Dance Company – Katie Spicer  
CandoCo Dance Company – Dawn Prentice  
Cholmondeleys and Featherstonehaughs -  
Dance Umbrella – Toby  
Random Dance Company – Hazel Coggins  
Ricochet Dance Company – Jo Holding

### OTHER ARTS PRODUCERS AND MANAGERS

Penny Andrews  
Heather Knight  
Fern Potter  
Jan Ryan, UK Arts International  
Nick Sweeting  
Your Imagination

### SERVICE PROVIDERS

Theresa Beattie, Artist Development, The Place  
HB Arts  
Madeline Hutchins, Services for Arts Managers  
Richard Lee, Jerwood Space  
Hans de Kretzer, [www.londondance.com](http://www.londondance.com)  
Network Business Travel Service  
Stage Management Association  
Stephen Munn, Laban Centre (formerly the Technical Connection)  
Chris Stenton, Foundation for Community Dance/[www.workindance.com](http://www.workindance.com)

Documents examined:

[www.londondance.com](http://www.londondance.com)

[www.artquest.org.uk](http://www.artquest.org.uk)

[www.anweb.co.uk](http://www.anweb.co.uk)

[www.interchange.org.uk/legal](http://www.interchange.org.uk/legal)

Contacts Directory

White Book Directory

Brochure from Business Travel Service

Independent Dance Managers Review by Nigel Hinds and Cathy O'Brien, December 2002

Correspondence with Chris Stenton re CreativePeople

Arts Professional (various issues).

## Appendix 4

### EXISTING SERVICE PROVISION

#### CASE STUDIES

NETWORK BUSINESS TRAVEL, a sub-division of Connex South Eastern, offers day to day business travel within the UK and Europe booked via a call centre and invoiced on a monthly basis. It works with customers whose annual spend on business travel is £5000 - £10,000 per annum. Train tickets are dispatched first class over night or (in emergencies) by special delivery. A courier service is available for central London customers. Up until recently, Network Business Travel made their money charging commission to the train companies. They have just introduced a monthly management fee (minimum charge £151). A user of the service (before the management fee was introduced) described Network Business Travel as "sounding perfect". It could still be complicated booking a company of 13 who all wanted to travel at slightly different times. Sometimes she could get a better price direct, and the hassle involved in changing tickets was much the same as it would have been dealing with the train companies. However, it did save time at times and the credit was useful. She would use them again (but didn't know about the management fee).

THE TECHNICAL CONNECTION, was set up in 1992 by Steve Munn and Steve Roberts to address the need of companies to have a one-stop shop for production services. The services ranged from production management to getting sound tapes made. The Technical Connection also acted as an "agent" for technicians, ensuring that good quality technicians were always available to its clients (eg, AMP, Michael Clarke, Jonathan Burrows). It ran for two years until 1994. The company ceased trading because, although there was a strong demand for the services, there was insufficient money to pay the management of the company.

As well as providing lectures and seminars on a wide range of legal issues affecting charities and the voluntary sector INTERCHANGE LEGAL ADVISORY SERVICE gives information, legal advice and support to a large number of voluntary organisations, including visual and performing arts companies. The initial consultation is free. After that any specialist follow-up is charged at affordable, low cost rates. Interchange will provide paperwork, draw up constitutions and give advice on setting up a company and will process applications to the Charity Commission (advisors often have experience of working at the Charity Commission). The cost of the whole package to set up a company and apply for charitable status is £500 including VAT.

H B ARTS is a division of Hotel Brokers. The company works with arts companies and provided information that its clients include Siobhan Davies Dance Company, Sadlers Wells, Dance Umbrella and Rambert. HB Arts works by charging commission to the hotel being booked, and the service is free to customers. They book 3\* accommodation and better at hotels on a budgeted basis of £40 per room per night. One user described working with Hotel Brokers as fine, particularly when working with large-scale non-budget accommodation. Another dance manager who had worked with Hotel Brokers in the past, felt that the service saved neither time nor

money, and would prefer to deal direct with the hotels, having built a strong database of contacts over a period of years. At a recent meeting of the Independent Dance Managers Network attended by 19 independent dance managers, only 4 had budgets where they could work within HB Arts' price structure. The rest were people working with lower budgets per room per night.

GOOD DIGS GUIDE was originally produced annually/bi-annually by the publishers of "Contacts" theatre directory and has now shrunk to two pages of the directory itself. It works by providing details of accommodation recommended by readers. It is updated annually with the directory.

STAGE MANAGEMENT ASSOCIATION FREE LIST is sent out once a month to 500 managers and producers in the UK. It contains contact details for members and their availability. Members have to apply to join the SMA and must provide 2 references, one of which must be from an existing SMA member.

ARTISTS DEVELOPMENT'S REHEARSAL SPACE DATABASE for London can be searched by cost, size, location and facilities but is not yet available on-line. Customers ring Artists Development and request details be sent to them which are then faxed or posted. It is not a booking service.

Appendices 5A & 5B are available on request from:

Administrator  
Dance Unit  
Arts Council England, London  
2 Pear Tree Court  
London  
EC1R 0DS