

## Claire Morton and Joe Bates, IDMN Bursary Award 2008

### END OF BURSARY REPORT

October 2009

#### Introduction

Claire Morton and Joe Bates are two dance managers working in the independent sector. Claire has now been working in the independent dance sector for four years (working in the museums sector for two years previous to that and with a background in dance) and Joe for three years (with three years experience previous to that working at The Place and London Contemporary Dance School).

Whilst both completing a Masters degrees in Arts Management in September 2007 (for which we were both supported by Arts and Humanities Research Council awards), we each undertook work with Gwen Van Spijk at CUE alongside starting to develop some of our own clients, allowing us to gain fundamental experience in the sector with guidance from an established and highly-regarded manager.

We subsequently made a significant shift in our operation by establishing a joint office at Marylebone Dance Studio and consolidating our working partnership, under the trading name Morton Bates Arts Services. This aligned with steadily increasing the work directly under our own portfolio and developing our presence and operation as service providers within the independent dance sector, working with a range of clients in varying capacities and roles.

In February 2009 we were awarded the first IDMN Bursary Award to support our professional development, both personally and as a partnership. This document seeks to summarise our bursary activity and evaluate its impact on our operation and professional development.

#### Bursary Programme and Evaluation

Prior to the bursary award, we had both achieved levels of academic and practical experience. Studying to MA level had given a solid theoretical grounding in the issues surrounding arts management; similarly, our practical experience in the sector balanced our theoretical studies, each complementing the other. We applied to the IDMN Bursary in February 2009, wishing to build on our knowledge and experience whilst utilising and developing our ongoing partnership through peer learning and support. We also recognised that as independents, there was no other route open to us to explore in regards to our professional development.

As managers developing within an independent freelance sector, the format of the IDMN bursary allowed us instigate our own tailor-made programme of CPD, in order to provide a structured and progressive route for our careers, which was relevant to us specifically at that point in time, and to aid our longer-term development.

Morton Bates Arts Services LLP, Marylebone Dance Studio, 12 Lisson Grove, London NW1 6TS  
Partnership No: OC343432. Registered address: c/o Goodman Jones, 29/30 Fitzroy Square, London, W1T 6LQ  
E: [clmorton@gmail.com](mailto:clmorton@gmail.com) / [joebateshq@gmail.com](mailto:joebateshq@gmail.com)  
T: 00 44 (0)20 7724 1616

Our programme of professional development aimed to enable us to develop our experience in the sector, both individually and as a partnership, through the following four strands over an 18 month period:

1. Building partnerships
2. Shadowing established individuals in the sector
3. Undertaking training courses in specific, identified areas
4. Career development sessions / coaching

### **1. Building Partnerships – a programme of meetings with venue managers/ promoters/producers and dance agencies in the UK**

We undertook a series of visits with UK venue managers/promoters/producers, in order to develop relationships with key partners that have had immediate and longer-term benefits. These visits enabled us to present our portfolio of clients (or specific clients as appropriate for that venue/region), identifying the venue's/promoter's priorities for activity and any synergies between those for future development, and was the first-step of developing longer-term links which will be built on throughout our careers in the independent sector.

Emphasis was based on partnership building, networking and opening lines of dialogue through face-to-face contact; these relationships have subsequently been sustained through telephone and email exchanges and further meetings on occasion and where relevant.

In many cases, the benefit of this face-to-face engagement was immediately apparent, allowing partnerships to be nurtured and information exchanged fluidly. In many cases, it also led to the development of bookings for clients' work or further work for Morton Bates through the taking on of new projects through that venue/partner. It increased our understanding of operations and priorities, which are now feeding into our working practice and being shared with our wider networks and clients.

We chose to focus on 4 specific regions in England and targeted those in which some of our clients were based, so as to fully realise the impact of liaising with partners directly related to our current portfolio. For this reason we chose London (as that is where we and some of our clients were based, and where many of the projects we work on aimed to build a profile), the East Midlands, the South East and the South West.

**London** - As Morton Bates Arts Services, and many of our clients, were based in London, we felt it important to nurture relationships with organisations close to our base and to help to develop long-term relationships in a competitive market where contemporary dance is often seen as a one-night event. Key meetings surrounding how companies and artists can operate more strategically in the capital included: Eddie Nixon (The Place); Alison Duthie (Royal Opera House); Kiki Gale (East London Dance); Betsy Gregory and Clare Farrow (Dance Umbrella); Judith Knight (Arts Admin); and Adrian Berry (Jackson's Lane/Stratford Circus). We also established contact with Janet Archer (Director of Strategy – Dance, Arts Council England, National Office) and Jamie Watton (Senior Strategy Officer, Dance - Arts Council England, National Office) through a series of client related meetings. Jamie Watton has now moved to South East Dance and we met him again in his new role. See appendix B for full details.

**South West** – We opened discussions with Kate Castle (Dance South West) and Chris Fogg (Take Art!) to meet and discuss their current strategies as our partnership was starting to develop a presence in the region, with three South West based artists in our portfolio at that point. We attempted to attend a consortium meeting with the key players for dance in the South West including Dot Peryer (The Works), Gillian Dale (Dance in Devon) and Angela Conlan (Wiltshire Dancing) to discuss management for independent artists and how our partnership could be developed in the future; however this meeting did not take place as we were not able to find a date

when the various partners were all available. However, this area continues to hold presence within our portfolio and we continue to foster our relationships with the key agencies and venues such as those above, as well as fellow IDM's, Eckhard Thiemann (working with Dance South West on the new dance venue in Bournemouth) and June Gamble (now working with Plymouth Dance) alongside Bridport Arts Centre, Lighthouse in Poole, Tacchi Morris, Brewhouse Arts Centre, Bath Spa University, Plymouth University and Dartington. Additionally, a meeting was held with Swindon Dance which in turn initialised IDMN's recent contact with the National Dance Network and the exchange of information around the touring project for Spring 2010.

**South East** – At the point of application, our portfolio featured two companies/projects based in the South East and this remains the case. Throughout the bursary we continued to strengthen our relationships in this region to both immediate benefit and longer-term benefit.

It is difficult to pinpoint which relationships developed purely due to the bursary; in many cases our bursary networking - and the profile it afforded us - worked well in tandem with specific clients and their own relationship with promoters and venues (for example Yael Flexer and Nic Sandiland's recent organisational development process); adding value, strengthening the relationship and our work in a wider context.

Meetings and relationships fostered in the South East included: Jan De Schynkel (ACE South East Dance Officer) who outlined particular strategic areas ACE is aiming to focus on and develop (including Hastings, Milton Keynes, Slough and Folkestone); Luci Napleton and Kate Hazel, Fuse Festival, Medway; Gail Brown, Kent County Council; Kirsty Bell, West Sussex (including a consortium meeting in West Sussex which gave an insight into the structures in place within the region at a local government level and an idea of regional priorities, and meetings with the South East Youth Dance Hub); The Hawth; University of Surrey; Creative Foundation, Folkestone; South East Dance; Quay Arts and Hastings & St Leonards Excellence Cluster. See appendix B for full details.

**East Midlands** – Prior to the bursary, we had experienced that touring in the East Midlands was often difficult due to a lack of venues appropriate for dance on the small-scale. We therefore sought to build partnerships with key organisations, in order to pursue future opportunities for partnerships including Dance 4, Deda, Lakeside Arts Centre, Curve, Buxton Fringe, De Montfort University and Lincoln Drill Hall. As well as opening and continuing dialogue with these key players in the region on behalf of our clients and strengthening relationships with three large East Midlands organisations, these relationships also led to new business for Morton Bates with East Midlands based projects and clients (for example tour booking, contracts and marketing support for the UK Tour of Telling Tales, produced by the East Midlands Children's Theatre Consortium), with a total of 3 clients/projects currently based in the region..

## **2. Shadowing established individuals in the sector**

Following both our academic practice and experience in the sector to date, we felt that some time shadowing established professionals would benefit our ongoing career development, allowing us to gain insight into key areas of operation and complementing our work as managers. We each identified different areas of interest as outlined below:

**Joe** decided to build on his marketing skills by working alongside and meeting with a range of marketing professionals who specialise in different areas: working alongside some on specific projects and meeting others more informally to discuss their working practices. This enabled inside knowledge and an insight into different approaches, helping to widen networks, nurture contacts and, specifically, open up writing skills and the ability to pitch to different types of media. This process included shadowing with:

- Martha Oakes from MOPR, a marketing and PR agency specialising in small and middle scale dance companies. Joe spent time with MOPR on a marketing strategy for Protein Dance, attending planning meetings and then developing a strategy for the Spring 2009 tour.
- Judy Lipsey from The Works, spending time focussing on PR and skills such as press release writing and working with the press
- Nadja Dias, Marketing Manager at CandoCo to discuss current marketing trends and the issues surrounding marketing and liaising with venues within the dance sector. This included developing social networking sites and online mailing lists for both MBAS and some of our clients
- Joining a dance marketers' network established by Nadja Dias to share knowledge and exchange experiences.

Throughout this experience Joe realised the importance of having a clear marketing strategy and brand when discussing both clients' work and that of Morton Bates. This experience therefore informed Claire and Joe's decision to reallocate some of the bursary money to help them build a website. It was felt that this online presence was important for the company's profile and both felt that it was a better use of a small portion of the money to redirect it in this way (see below for further details).

**Claire** spent some time shadowing individuals working in a programming and producing context, aiming to give an insight into programming priorities and decisions; building on her experience to date working with small-middle scale touring companies and feeding into her approach to that work in the future. This process included shadowing with:

- Adrian Berry – freelance programmer, consultant and director working with a range of arts organisations including: Stratford Circus, Jackson's Lane, New Wolsey Theatre and The Albany Theatre. Specifically, Adrian's involvement in programming children's and young people's work has relevance to work in the Morton Bates portfolio.
- Nick Giles - Artistic Director, Newbury Corn Exchange/New Greenham Arts (artistic programme, artist development programme, Newbury Comedy Festival) programming a cross-art form selection of work and working with artists in a development/producer capacity.

This process allowed the time and opportunity to shadow key figures in the sector and started to increase knowledge and practical understanding of specific areas of the industry. However, it is now identified that it was difficult to get a full insight into this in what was a relatively short amount of time. Instead, what this process mainly allowed was the fostering of a more in depth relationship than strand 1 of the bursary activity could allow, and this will be of use in the future in continuing work with these venues. If Claire was to undertake similar professional development activity in the future, she would suggest structuring it more in the shape of a secondment, spending an increased and focussed amount of time with one organisation in order to get full benefit.

During the bursary Claire and Joe acknowledged this difficulty when it comes to shadowing individuals and therefore decided to reduce the amount of time allocated to this area of their development, refocusing the time towards more networking, which proved to be more effective in terms of their business development, raising the profile of their work in the sector, and widening the breadth and impact of their engagement across the sector.

### **3. Undertaking specific training courses**

Although not a major focus of this programme of activity, we each undertook some specific training sessions to 'skill-up' and keep up to date with particular areas of knowledge. These included an Arts Marketing Association course for Joe on copy writing led by Heather Maitland and Claire attended the YDE 2-day course in Spring 2009 which would have not been possible to attend without the bursary funds, due to both the costly course fee and taking two days out of the office.

We both also attended a half-day course on Managing Creative Partnerships at the British Library, which sought to address partnerships both with their clients and examining our own partnership in more depth. This was particularly beneficial as it enabled us to interrogate our working relationship and identify strengths and weaknesses as a partnership. We were able to clarify our working relationship and discuss with other partnerships ways in which they operate, and whether other models would be more suitable for us. This complemented our ongoing business development with June Gamble (see below).

By undertaking different training courses and feeding back to each other afterwards, we increased the value of individual events and utilised peer learning within our partnership.

### **4. Career development sessions / coaching**

To facilitate our professional development plans, we built into the programme four sessions with June Gamble at key points throughout the bursary period. June Gamble is a qualified life-coach who has 18 years experience in the independent dance sector. This enabled us to review and evaluate our progress and examine any issues, both individually and as a partnership, and helped to structure the evaluation of our career and evaluate the wider benefits on our practice and development of the activity undertaken.

This process also helped us to identify strengths and weaknesses (as both a partnership and as individuals) which in turn allowed us both to develop further certain areas of skill, contacts and subsequently our portfolio, leading us to start developing some niches within that. Some important outcomes include:

- Building time into our working week to address the needs of the business (for example bookkeeping, marketing, developing new work/contacts, checking-in with each other)
- Building in 'away days'/time away from the office throughout the year to discuss and evaluate business operation, the future of the business and plan future activity in a structured and strategic way
- Interrogating the 'core values' of the business to check and assess whether we are operating effectively and in a joined-up way; making sure our values are aligned (or recognising where they are not), discussing the different approaches and rectifying any discrepancies in our approach or values as appropriate. This was also an incredibly valuable tool to use in helping to identify what projects might or might not be relevant and appropriate for MBAS to take into its portfolio.

### **Changes to original application**

As mentioned above, there were two main changes to the original proposal:

1. Reallocating time away from shadowing individuals and putting it towards developing more opportunities to meet and network with key individuals
2. Saving some of the time away from the office so that the money could be reallocated to develop a Morton Bates Arts Services website (currently in development)

Both these changes were discussed in full and built into our ongoing strategy for the bursary. The changes were deemed necessary, responded to the current situation of the business, and sought to increase the benefit of the award we were given as it was felt appropriate, maximising the impact of its effect on our personal and business development.

## **Summary**

The various strands of activity centred on both our individual and joint development, utilising peer-learning and support, which had always been at the core of how we operate. It aided the progression of our partnership, past the immediate-term, into the future; whereby our experience, skills, contacts and networks were developed to enable us to diversify our remit, client base and services.

The bursary undoubtedly increased our skills, knowledge and abilities into key areas of the sector and helped to cement a strong position, individually and as a business, from which to progress in the future. Part of this process saw us formalise our business into a Limited Liability Partnership (LLP) in order to provide a more suitable and fit-for-purpose structure for our work. The development enabled through the bursary programme was instrumental in us reaching this stage and in strengthening our business' brand and position in the sector.

The award, and activity undertaken through it, encouraged our working practices to be increasingly efficient and effective and to disseminate what we had learnt on a daily basis through our work with clients, partner organisations and with other managers. It is considered that the activity undertaken also raised the profile of independent dance management sector, and of the IDMN, more generally and built relationships on its behalf, as we sought to advocate for the IDMN whilst on our bursary visits and in conversations with venues. Furthermore, in our in conversations with the wider sector about the bursary, it was felt to be the kind of professional development scheme that the sector and its workers needed. Additionally, even the application and interview stage of the bursary was of benefit to us, as it encouraged us to consider and plan our development and offered a chance to meet and engage with the wealth of experience on the interview panel itself.

The flexible format of the self-designed bursary programme was highly appropriate to fitting such a programme around our portfolio of work, making its delivery feasible and allowing us to obtain full value from it at the most appropriate times. As such, as the increased profile that this activity created helped to generate more work for Morton Bates, the bulk of the bursary activity was undertaken towards the beginning of the programme of activity, in a way that a more prescribed programme of professional development may not have allowed. Likewise, as we implemented the programme we found more value in some areas than others and adjusted the activity undertaken in line with this (see budget for further details). Financially, the bursary activity was delivered on budget. A large proportion of the award allowed us to take time out of the office to undertake the above activities, and as this can be one of the main barriers to investing in professional development when you are self-employed or running a small business, this was invaluable. We earmarked a small proportion of the monies from across the various strands of activity to allow us to develop a web presence, which will be kept up to date in house once developed. It is felt that this is now needed in order to increase our profile and make information about ourselves and our clients easily accessible, which will undoubtedly continue to benefit us as we progress our careers as independent dance managers.

**Appendix A) Final Budget:**

| <b>Activity</b>  | <b>Notes</b>  | <b>Original Amount</b> | <b>Final Total</b> |
|--|---|------------------------|--------------------|
| Days out of the office for visits                      | 8 days total at £150 per day (increased to 11 days total)   | £1200                  | £1650              |
| Travel and Accommodation for visits (excluding London) | Total 6 visits @ £80 per visit  | £480                   | £496.00            |
| Days out of the office for shadowing                   | 12 days total at £150 per day (reduced to 5 days total)   | £1800                  | £750               |
| Days out of the office for training                    | 4 days total @ £150 (reduced to 3 days total)   | £600                   | £450               |
| Training course fees                                   | Total 4 courses at £150 each  | £600                   | £600               |
| CPD sessions with June Gamble                          | 4 x 3 hour sessions @ £250 per session  | £1000                  | £1000              |
| Final Evaluation                                       | Total 1 day @ £150 (increased to 2 days total to include business planning)                       | £150                   | £300               |
| Website development                                    |   | £0                     | £500               |
| <b>SUB TOTAL</b>                                       |   | <b>£5830</b>           | <b>£5746.00</b>    |
|  | Discount offered by June Gamble for career development sessions                                   | -200                   | -200               |
|  | Financial contribution from Morton Bates Arts Services – Discounted daily rate (reduced to £130 ) | -500                   | -£420              |
|  | Contribution to regional travel and accommodation from clients/promoters                          | -130                   | -£126.00           |
| <b>TOTAL</b>   | <b>Amount requested from IDMN</b>   | <b>£5000</b>           | <b>£5000</b>       |

## Appendix B) List of contacts and network developed

| Region     | Who                            | Role & Organisation   | Notes  |
|------------|--------------------------------|---|--|
| South East | Jan De Schynkel                | Dance Officer, Arts Council England, South East                               | Have had a number of meetings throughout the bursary to discuss current priorities and various clients   |
|            | Jane Freund                    | Assistant Programmer, De La Warr, Bexhill-on-Sea                              | Built relationship but has unfortunately left the organisation   |
|            | Laura Ducesschi                | Head of Programming, De La Warr, Bexhill-on-Sea                               | Started relationship through Jane (see above) but not that interested in dance   |
|            | Luci Napleton                  | Dance Development Officer, Medway (Fuse Festival)                             | Met through Bedlam Organisational Development - started relationship   |
|            | Gail Brown                     | Surrey County Dance Officer   | Claire met and talked to at YDE conference   |
|            | Kirsty Bell                    | West Sussex Dance Officer   | Have been invited to a range of events, development meetings and attended South East hub meeting with Kirsty. Built strong ongoing relationship                        |
|            | Pauline Johnson & Sara Houston | Surrey University (Sarah now at Roehampton)                                   | Met on 25th April at Reflective Practice day at Surrey and continued to stay in touch with regards to programming  |
|            | Karen Da Silva                 | Surrey University   | Met through Bedlam Organisational Development - started relationship and talked to further about programming   |
|            | Jamie Harber                   | Surrey University   | Liaison through Bedlam and Laila Diallo. Built strong relationship and constantly talking about clients and programming  |
|            | Roberta Spicer                 | Creative Foundation   | Met through Bedlam Organisational Development - started relationship and she has booked one of our clients (family theatre) but still developing an audience for dance |
|            | Gregory Nash                   | The Point   | Met and was invited to spend a day at The Point seeing how they operate. Sat in on meetings and have now built strong relationship                                     |
|            | Kim Johnson                    | The Point   | Have been in constant liaison and worked with Kim on a range of projects since visiting The Point  |
|            | Jeanette Brooks                | Hextable Dance  | Working with Jeannette and Bedlam but was unable to meet up  |
|            | Jamie Watton                   | South East Dance  | Met when he started his new job and gave information about our range of clients. Also attended the Face-To-Face meetings run by SED                                    |
|            | Alex Grant                     | Dance Development worker, Hastings and St Leonards Excellence Cluster         | Worked with Excellence Cluster and Bedlam and continuing relationship with schools in Hastings   |
|            | Jo Council                     | Gifted and Talented Co-ordinator, Hastings and St Leonards Excellence Cluster | Worked with Excellence Cluster and Bedlam and continuing relationship with schools in Hastings   |

|                   |                                |   |   |
|-------------------|--------------------------------|---|---|
|                   | Jo Hardy                       | Dance Development Officer,<br>Surrey County Council       | Met a number of times to talk about clients and our current work. Built strong relationship for the future  |
|                   | Sarah Gilmartin                | Dance Development Officer,<br>Surrey County Council       | Met through Bedlam Organisational Development and talked about future projects.   |
|                   | Mary Brady and Nick Chapman    | Woking Dance Festival                                     | Met through Bedlam Organisational Development and New Art Club. Discussed programming priorities and areas of interest and aim to keep in contact with future activities    |
|                   | Maria Ryan                     | Dance Development Officer,<br>Wycombe Swan                | Joe met Maria a number of times through a range of clients and talked to her about the bursary. We are now firmly on her radar and continue to discuss projects and clients |
|                   | Dave Watmore                   | Director, The Hawth                                       | Met and discussed programming priorities and budgets. Currently discussing a range of projects.   |
| <b>South West</b> | Kate Castle                    | Dance South West  | Spoke to Kate to discuss attending a consortium meeting. Previously talked about new models of distributing work in the south west region                                   |
|                   | Eckhard Thiemann               | Dance Programmer, Bournemouth Pavilion                    | Have had various conversations with Eckhard about our current portfolio and the work of IDMs in general   |
|                   | Gillian Dale                   | Director, Dance in Devon                                  | Discussed current projects and clients and will build relationship into the future  |
|                   | Sally Williams                 | The Works, Cornwall                                       | Claire met in August 09 and continues to stay in touch on a variety of MBAS projects.   |
|                   | Paula Hammond                  | Director, The Merlin Theatre                              | Joe met Paula a number of times at events and informally discussed Morton Bates, the bursary and our current portfolio  |
| <b>London</b>     | Betsy Gregory and Clare Farrow | Director & Manager, Dance Umbrella                        | Met to discuss portfolio and continue to keep up to date with work  |
|                   | Fiona Ross                     | Head of Connect, Sadler's Wells Theatre                   | Joe worked alongside Fiona through the Destino project and was able to talk to her more widely about his work and current portfolio   |
|                   | Adrian Berry                   | Freelance Programmer and Jackson's Lane Artistic Director | Claire met up with him to discuss programming priorities in the spaces he programmes and subsequently have stayed in touch and met further to discuss projects and clients  |
|                   | Polly Risbridger               | Creative Producer, East London Dance                      | Met Polly and talked about the bursary and our current clients  |
|                   | Kiki Gale                      | Artistic Director, East London Dance                      | Met Kiki and discussed current projects and the IDMN more widely  |

|                      |                  |   |  |
|----------------------|------------------|---|--|
|                      | Eddie Nixon      | Theatre Director, The Place                           | In constant liaison with Eddie and have met a number of times to discuss portfolio. Eddie has also introduced us to new potential clients          |
|                      | Julia Carruthers | Head of Dance and Performance, South Bank Centre      | Was unable to find a suitable date but will continue to build this relationship in the future  |
|                      | Brendan Keaney   | Director, Greenwich Dance Agency                      | Aim to meet to round off the bursary and feedback on the whole process   |
|                      | Judith Knight    | Director, Arts Admin                                  | Met to talk about business models for our partnership and how to plan for the future.  |
| <b>East Midlands</b> | Eva Martinez     | Programme Manager, Dance 4 (now at South Bank Centre) | Met to talk to about current clients and mentoring artists in the future   |
|                      | Stephen Munn     | Director, Deda (formally Derby Dance)                 | Introduced our work to Stephen which has led to Claire Cunningham coming into our portfolio and a large contract with the East Midlands Consortium |
|                      | Ellen Bianchini  | Sparks Children's Festival                            | Introduced through Stephen Munn and now work with Ellen on Telling Tales, this is an ongoing relationship  |
|                      | Shona Powell     | Director, Lakeside Arts Centre                        | Introduced through Stephen Munn and now working with Shona on Telling Tales, this is an ongoing relationship                                       |
|                      | Ruth Eastwood    | Artistic Director, The Curve                          | Met and had a tour of the new building, currently discussing clients and future work   |
|                      | Stella McCabe    | Assistant Artistic Director, The Curve                | Met and had a tour of the new building, currently discussing clients and future work   |
|                      | Paul Russ        | Director, Dance 4                                     | Claire met and discussed current portfolio of work   |
|                      | Sally Doughty    | Head of Dance, De Montfort University                 | Met and have had liaison with her about a range of projects and clients  |
|                      | Matt Ashton      | Head of programming, Lakeside Arts Centre             | Met and discussed programming priorities and current portfolio   |
|                      | <b>Others</b>    | Anthony Baker   | Artistic Director, DanceDigital (formally EssexDance)  |
| Janet Smith          |                  | Artistic Director, Scottish Dance Theatre             | Met at a number of events and now in constant liaison about clients, projects and programming  |
| Natalie Richardson   |                  | Programme Manager and Producer, Trestle Arts Base     | Met to discuss current programming trends and priorities. Have built strong relationship for future partnerships                                   |