

## Performing Arts Organisations and Education: a Role for Boards

### Introduction

PAEback<sup>1</sup> came into being when a small group of people who were serving on the Boards of performing arts organisations began to meet informally to discuss and share views about that experience. Each of the group carried an education remit on the various Boards involved, and most have backgrounds in the education sector.

We share an enthusiasm for creating opportunities for learners of all ages to engage directly with professional art and artists. We also share a view that artists and art forms, and in particular those within the classical traditions with which we are associated, need constantly to redefine themselves in terms of their relevance to an increasingly diverse population, and of their place in a dynamic living culture.

We believe that the activities which fall under the broad banner of 'education' enhance the reach, reputation and performance of arts organisations. Organisations which reach out into the community, however that is defined, broaden their appeal, draw new audiences into their work, and encourage people to engage in artistic activities. The art, or the place where the art happens, may no longer seem remote or inaccessible or elitist. Performers, artists and technicians who engage in educational activities learn about their art and about themselves by exposing themselves to the fresh eyes of non-professionals and young people, and sometimes, by encountering lives very different from their own, learn to challenge misperceptions and stereotypes. Thus the health of the organisation is strengthened. In more instrumental terms, educational activities attract funding, both public and private, as well as political support.

When we began our discussions, we realised very quickly that as Board members we had little comparative or benchmarking information, and we felt little pressure to deliver to a certain standard or set of expectations. Although Arts Council England, other funders and sponsors, and the organisations with which we were associated all declared themselves pro-education, there seemed little interest in checking what happened, and whether or not it was any good.

We also shared a concern that for many Boards and Board members monitoring educational activities may be unfamiliar territory. We concluded that education may be something that the Board broadly supports but that it's likely that many Board

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<sup>1</sup> The name is based on the acronym of Performing Arts Education. See Appendix for a list of PAEback members

members feel they lack the expertise – and the interest – to engage with education in the same way as they might with, say, financial management, fundraising, or commissioning a new building. This may be in part because education budgets are small compared to, say, production budgets. But we also suspected it might be because of a mixture of lack of knowledge and not seeing education as a primary strategic issue.

We wanted to stimulate debate and the sharing of experience about what the proper role of a Board in this area might be. This paper is the outcome of that debate. We have spoken only to a small minority of organisations and individuals, and we do not claim comprehensiveness. Beyond our interest in, and enthusiasm for both education and the performing arts, we have no particular axes to grind, nor anything to give or withhold. Put simply, we have sought to stimulate debate and the sharing of experiences about what the proper role of a Board might be in relation to performing arts organisations' involvement with and/or in education. Perhaps it is that open ended objective, allied with our disinterest and independence, that encouraged so many busy people to contribute to our discussions and we are very grateful to them for doing so. We are also indebted to the Paul Hamlyn Foundation, whose support and guidance was invaluable.

## **Key observations**

We believe Board engagement with education matters because Boards are inclined to focus on intent, outcomes, value, and sustainability. The attention of the Board acts as a safeguard, and encourages a holistic view of all company activities. Our vision is that the Boards of all performing arts organisations would come to regard education, in some form, as integral to their overall mission and, over time, feel fully equipped to discuss education strategy and practice in an informed way, as they presently do other matters relating to the health of the organisation.

There are some organisations where this vision is a reality for both the Board and management, where education, in the words of one participant, runs through the organisation 'like the letters in a stick of rock'.

But these examples are few and far between. It is apparent that:

- Boards rarely ask why they should be involved with education activities, and if so, how best to go about it.
- Boards frequently regard education as simply a 'bolt-on' with no impact on the core artistic activities.
- 'education' can mean many things, but it certainly should not be confined to work with schools or with children. Each company will have its own focus and rationale.
- some Chairs and Board members feel deterred from delving into this area because of a concern that they lack expertise.
- evaluation and challenge are universal problems.
- finding a language for Boards, who can be caught between the language of specialists and generalised waffle, is an issue.

- in many organisations there is an over-dominance of project-based work, often driven by the search for funding and shifts in government policy.
- there are too many missed opportunities for funders to engage with improving the extent and quality of Board engagement with education, and to commit to a more strategic approach.

**We suggest** that Boards should

- find time to discuss fundamental questions about the purpose of their organisation and its relationship to education
- develop a formal rationale for education activities and advocate their development
- invite the appropriate officer with responsibility for education activities to Board meetings (at least once a year) to discuss the purpose, evaluation and outcomes of the education programme and its impact upon the organisation
- seek to ensure that the Chief Executive and the Chair of the Board take a similar view on the role of education within the organisation
- ensure that rigorous evaluation be undertaken for all major projects and programmes, to include an assessment of how far the stated objectives and desired outcomes (formulated at the start of the programme or project) have been achieved.
- be fully informed about education activities, and attend as many as is practicable.
- ensure that funders are proactively engaged in developing a dialogue about strategic aims in order to ensure that education activities are sustainable, and of high quality.

We do not believe that Board members necessarily need expertise in the field of education – rather an enquiring attitude which is informed by seeing the education activities in action and talking to the education team and participants.

## Our discussions in more detail

### The way we worked

As a group we began by sharing experience and concerns and arrived at a number of key issues and questions to which we agreed we should seek some answers. We spoke with senior Arts Council England officers, and officials in government departments, but we also felt we needed to share and test out our thinking with some of those directly involved in the governance and work of other performing arts organisations. The Paul Hamlyn Foundation generously agreed to organise a series of discussions to be chaired by the *PAEback* group. Three were held in London, one in Leeds, and one in Ludlow.

The first two discussions focused mostly on large or national organisations: the first with Chairs and Board members, and the second with CEOs and Directors of Education (DEs). The third involved a small group of funders (commercial organisations as well as charitable foundations). The last two involved a variety of regional, and smaller, organisations. We covered most performing art forms, and many different types of organisation: producers, venues, and touring companies. Most, though not all, of the organisations received public funding, whether from Arts Council England or Local Authorities or both.

The discussions took place under Chatham House rules, and *PAEback* members emphasised that they contributed as individuals and not as representatives of their respective organisations or Boards. Two Clore Leadership Programme fellows, each of whom has been focusing on governance as part of their fellowship, joined the group to help with compiling a record and to facilitate cross-fertilisation between *PAEback*'s work and other governance initiatives.

Three sets of questions underpinned all the discussions:

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| <b>Strategy</b>    | How does education activity feature in the company's rationale?<br>Who, or what, drives the company's education strategy?               |
| <b>Evaluation</b>  | By what processes is the education activity systematically evaluated and reported to the Board?   |
| <b>Involvement</b> | What is the involvement of Board members in the education activity?<br>What expectations do management have of the Board's involvement? |

## Strategy

Organisations varied greatly on a spectrum from very little to complete Board engagement. At one end were organisations where Boards were not engaged in any real sense with determining the place, nature or role of education within their organisations. Many of these organisations were large and long-established, including some of our major national companies. Some in this group were attempting to change: by modifying committee procedures or, more radically, changing the composition of the Board to ensure more education expertise and interest.

There were a number of reasons for the lack of engagement. The most fundamental was the lack of clarity overall about what Boards of performing arts organisations are there for. That uncertainty was instrumental in creating a culture that discouraged Board members from asking “why?” about anything. In addition, Board members and CEOs found it difficult to define what was meant by education within the context of their organisations. Even those who had developed such a definition, mainly DEs, differed markedly in how they perceived the nature, role and place of education in the organisations’ missions. There was, for some, an unresolved question as to ‘who is it for: them (the public), or us (the company)? And some DEs are clearly intent on creating and maintaining a distinctive and separate empire.

The adverse impact of that general uncertainty was exacerbated by a number of claims that education is:

- regarded as peripheral to the main business;
- driven by external agendas and as such something that “should” be done rather than something the company wants or believes it must do;
- peopled by charismatic enthusiasts with a language, agenda and type of professionalism impenetrable to Board members;
- lacking shape, coherence and relevance to company missions as it is pulled hither and thither in response to numerous, varied initiatives promising funding;
- operating in a culture in which performers and directors have no knowledge of it, and/or regard it as second rate.

At the other end of the spectrum there was a quite different picture. Board engagement with education was effective, with frequent discussion at Board meetings, and involvement of the whole Board (not just a few individuals or a sub-committee), resulting in a Board well-informed about context as well as the work, and regular evaluation and review of key strategic choices. Education was seen as a two-way process. One Education Director argued that education work is ‘the interface between audiences, practitioners, and the art form, and as such is an iterative process in constant flux, in which the nature of the art is changed and redefined, (bringing) freshness and excitement to artistic work’.

These organisations were generally (though not exclusively) characterised by being newer (often set up with Lottery money and attendant expectations of social inclusion) and/or smaller, and, in the case of regional organisations, reliant on Local Authority funding (which also carries explicit expectations of community involvement). Education tended to be placed within the company mission and, in some, at the core of all that the company did. In a few organisations education was

intrinsic to, and inseparable from, the main programme and this ensured that educational objectives, practices and outcomes permeated all that the company planned and carried out, and how it gauged its effectiveness. In large part the inclusive missions of these organisations were influenced and shaped by considerations of the role and responsibilities of the arts, and arts organisations, in a wider cultural and social setting. Among those considerations were the implications of large-scale public funding, particularly lottery funding; increasing the benefits to the company by increasing the reach and depth of the “cultural offer” through education work; and responding to the much clearer inclusion and regeneration agenda coming from Government.

The impact of Local Authorities was much in evidence outside London and the big companies. Many Boards have local authority representation, and some who came to our meetings were local councillors. Whilst it was evident that this created a high level of expectation that organisations would actively engage with their local communities, and particularly their local schools, there were disadvantages too. ‘Education’ has become a bit of a catch-all for all things instrumental, and in seeking proof of instrumental impact, councils can focus on number counting and box ticking – as councillors seek to justify spending on the arts – to the detriment of substance. Organisations can also become pawns in political agendas.

In some Northern cities, performing arts organisations had started working together in pursuit of funding, to avoid duplication and the risk of everyone chasing the same ‘pot’.

Many organisations have changed the name of their education departments – to ‘Learning’ or ‘Participation’, for instance – in response to a sense that ‘education equals schools’. But there were also strong voices articulating the view that the very looseness of the term was an advantage.

## **Evaluation**

There was general agreement that while much education work was well-planned and executed, and that it enhanced the standing and work of performing arts organisations, some of it was neither relevant, nor good, and finding ways to remedy that, in part by being able to judge and encourage high quality work was both important and pressing.

For the professional work of the organisation there are a range of ‘performance indicators’ which together serve either directly or as proxies for measuring success: box office figures, critical acclaim, audience response etc. But education programmes and activity are not so easily measured, and there are no generally accepted indicators. Crude numbers are insufficient and frequently unhelpful. ‘Value for money’ calculations may mislead. Nevertheless poor work can affect the company as a whole. One contributor to our discussions expressed concern that there is a lot of ‘tawdry’ practice and evaluation, and that many young people could be put off the arts as a result. He added: ‘the prevalence of the “we have an education programme and therefore our art is worth funding” approach to securing sponsorship is a cause for concern’. The lack of a ‘handle’ on standards and quality was also a concern for some in the DCMS.

Discussion of quality homed in on the difficulties of measurement and evaluation in the performing arts such as how to:

- give due weight to qualitative as well as quantitative analyses, neither being sufficiently in evidence;
- avoid the strait-jacketing, risk aversion and playing safe that too often accompany box-ticking evaluation;
- gauge the relative merits of small-scale/intensive and large-scale/more wide-ranging education programmes.

In some smaller organisations in particular, there was a reluctance to challenge the efficacy of the work for fear of demoralising hard-pressed staff. One Chair acknowledged that while staff would know whether or not something had worked, disappointment was unlikely to reach the Board, even if she herself might be aware of it.

Funders generally operate light-touch evaluation, and appreciate the difficulty of measuring this work: 'If we were stricter with our evaluation we'd stop funding the arts!'. They often have to make big leaps of faith and don't want to be or appear risk averse. Models of evaluation differ from project to project. Some organisations have been canny about measuring impact, for instance on inferred improved test results. But there is a paucity of longer term evaluation in terms of continuing to monitor the effect on participants after the end of a project.

It is clear that the issue of evaluation is problematic, even for those organisations who have wrestled successfully with strategic issues. Our discussions have led us to conclude that while Boards need not get involved in the business of evaluation, or in the detail, they should seek assurance that evaluation does take place and that it is explicitly used to inform future decisions. It can make a vital contribution to strengthening the case not just for education activities but for the organisation as a whole. The most important starting point is that the objectives and desired outcomes of a programme of work or a project should be articulated before it begins.

## **Board Involvement**

Board members and executives were divided about the desirability, or otherwise, of separate education sub-committees. Some claimed that unless education business came before the whole Board as a distinctive agenda item, it would not be taken seriously. There was also a danger that important issues are decided in sub-committee without coming to the full Board. Others argued that given the amount of business that comes before a Board, education items would simply get nodded through.

There was general agreement that Boards carry the responsibility to determine the strategic nature, disposition and direction of a company's work, including its education work, but there was no general agreement about how to go about doing that. Most, but not all, Board members agreed that they should get to know more about the education work of their organisations by seeing it in action, and should be prepared to say what they thought about it.

## Funders

Arts Council England, which funds most of the organisations to whom we have spoken, requires these organisations to engage in education activities in return for their funding, and monitors education performance in terms of simple measurables, but leaves strategic decisions and quality issues to Boards. Other funders to whom we spoke, whilst recognising the importance of Boards overall in determining the health of organisations, and in particular in succession planning, did not regard Board involvement or endorsement of education projects as necessary to funding. Whilst they tended to note whether or not Board members turned up at key events, they acknowledged that they couldn't require change. For them, the creative dialogue between funders and Artistic Directors or Directors of Education (not Development personnel) was key to determining the necessary commitment to a project.

Funders bore out the impression that Board members (including their own) were often afraid to ask questions about education for fear of sounding naïve or ill-informed. They also noted the difference between newer/smaller organisations (where the relationships between funders and the organisation, and between staff and the Board were generally closer), and the older, particularly national, organisations. They agreed that relationships between funders and organisations could be much better if funders and Boards were more engaged with the full range of organisations' activities – after all they are both committed to long term organisational health.

Funders had recognised what many Boards had not, namely that education is key to achieving the aims of their wider agendas of relevance, diversity and public benefit. While disappointing in itself, that lack of shared understanding could also impact on future relations between funders and arts organisations. As funders move towards more directed funding, increasingly determined as much, if not more, by social as by artistic objectives, they seek to gauge the extent and depth of understanding of, and commitment to, education and social inclusion within arts organisations. In doing that, funders are beginning to take note of organisational 'DNA', including the extent to which education and access are intrinsic features of all parts of the organisation, including at Board level.

## The future

In the course of our discussions we have uncovered some important issues for the performing arts. For too many organisations, it would seem that education activities, which are a crucial component of, and key contributor to, the health and vigour of those organisations' artistic endeavours and to their community interaction and engagement, get scant or superficial Board attention. For many of those Boards who do take an interest, there are abiding concerns about how they can know how good the work is. These two issues – how to persuade Boards to take this seriously, and what to do about assessing quality – need to be addressed, for the sake of the further development of individual organisations, and, arguably, for the sake of the continuing relevance of the performing arts in our changing world.

There is a plethora of initiatives focused on governance in the arts, many of them necessarily aimed at getting the basics right in terms of Board responsibilities. We would like to see, as part of this focus, more attention paid to encouraging Boards to delve more deeply into the rationale for their activities and to be prepared to ask that crucial question: 'Why do we do what we do?'

Here are just some of the ideas that have emerged from our discussions:

- A conference or seminar at which Chairs and CEOs could share best practice.
- A feasibility study to establish a national award for education excellence within performing arts companies
- A 'toolkit' for Boards to help them develop and appraise education strategy, including descriptive case studies
- A research project focused on good practice in evaluation of education activities

Whilst the PAEback group is not in a position to take this on formally – we are only an ad hoc group of like-minded people with no office back-up or legal structure – we want to encourage others to take up our cause, making use of the information and insights we have collated and working towards making our vision become a widespread reality.

We are keen to hear feedback on our suggestions, and on this paper as a whole, and in particular to engage in debate about how to put our suggestions into action in individual organisations. Please contact [jane.drabble@dial.pipex.com](mailto:jane.drabble@dial.pipex.com) or Jane Drabble, c/o The Paul Hamlyn Foundation, 18 Queen Anne's Gate, London SW1H 9AA.

PAEback, April 2007

## Appendix

### **PAEback group members**

<b>Prof Eric Bolton</b>	Foundation for Young Musicians; LSO Education Advisory Committee
<b>Jane Drabble</b>	Royal Shakespeare Company; Birmingham Royal Ballet; Governor of the Royal Ballet Companies
<b>Prof Margaret Maden</b>	Royal Opera House; Royal Ballet School
<b>Maggie Semple</b>	Sadlers Wells Foundation; The Brit School; Arts Educational Trust
<b>Peter Renshaw</b>	Nuance Music Ltd; London International Festival of Theatre (LIFT); Centre for Creative Communities; Animarts
<b>John Stephens</b>	Britten Sinfonia; LSO Productions Ltd; LSO Education Advisory Committee

### **Clore Leadership Programme Fellows**

<b>Sara Robinson</b>	Freelance arts consultant and projects director; current work focuses on developing strategy for governance and learning in the cultural sector; former Director of Ludlow Assembly Rooms; Trustee, Yorkshire Youth and Music, and The Shipley Glen Tramway
<b>Jacqueline Riding</b>	Arts consultant; member of MMM Governance Working Group and Action Group; formerly Director of Handel House Museum

### **Participants in our discussions**

#### *Chairs and Trustees*

<b>Bob Boas</b>	Paul Hamlyn Foundation; British Library National Life Story Collection; Gabrielli Trust
<b>John Botts</b>	Glyndebourne; Tate Foundation; University of the Arts
<b>Sir David Lees</b>	Royal Opera House
<b>Baroness McIntosh of Hudnall</b>	Almeida; NESTA; Peggy Ramsay Foundation; Roundhouse Trust; Southbank Sinfonia; Theatres Trust; Welsh National Opera
<b>The Rt Hon Lord Smith of Finsbury</b>	Wordsworth Trust; Donmar Warehouse; National Theatre
<b>Lord Stevenson of Coddendam</b>	Aldeburgh Productions; Glyndebourne; University of the Arts
<b><sup>1</sup>Pru Skene</b>	Rambert Dance Company

#### *Chief Executives and Directors of Education*

<b>Andrew Burke</b>	London Symphony Orchestra
<b>Anne Gallacher</b>	Birmingham Royal Ballet
<b>Tony Hall</b>	Royal Opera House

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<sup>1</sup> Did not attend seminar but met separately with PAEback members

<b>Nick Hytner</b>	National Theatre
<b>David Lan</b>	Young Vic
<b>John Summers</b>	Hallé Orchestra
<b>Katherine Zeserson</b>	Sage Gateshead
<sup>1</sup> <b>Patrick Spottiswoode</b>	Globe Education
<sup>1</sup> <b>Sarah Alexander</b>	WNO MAX

*Leeds*

<b>Elizabeth Minkin</b>	Trustee, West Yorkshire Playhouse
<b>Jim Clarke</b>	Chair, Harrogate Theatre
<b>Carol Runciman</b>	Governor, York Theatre Royal
<b>Paul Allen</b>	Chair, Sheffield Theatres
<b>Brian Debnam</b>	Chair, Theatre San Frontières
<b>Ann Wishart</b>	Trustee, Pilot Theatre
<b>Jo Butterworth</b>	Trustee, Northern Ballet Theatre
<b>Tim Bailey</b>	Chair, Northern Stage
<b>Brian Dogherty</b>	Chair, Tees Valley Dance
<b>Nadine Senior</b>	Chair, Phoenix Dance Theatre
<b>Barry Thomas</b>	Chair, The Arc, Stockton

*Ludlow*

<b>Su Barber</b>	Trustee, Blue Eyed Soul
<b>Patrick Boyd Maunsell</b>	Trustee, Trading Faces Theatre Company
<b>Sir Brian Fender</b>	Chair, New Vic Theatre
<b>Mike Penn</b>	Trustee, Ludlow Assembly Rooms
<b>David Peter</b>	Trustee, Wyeside Arts Centre
<b>Kate Organ</b>	Chair, Black Country Touring & Warwick Arts Centre
<b>Robert Petty</b>	Chair, Pentabus Theatre
<b>Margaret Thomas</b>	Chair, Courtyard Centre for the Arts

*Funders*

<b>Sally Bacon</b>	Director, Clore Duffield Foundation
<b>Robert Dufton</b>	Director, Paul Hamlyn Foundation
<b>Carol Lake</b>	Managing Dir JP Morgan Save and Prosper Foundation
<b>Nick Wright</b>	Executive Director, UBS
<sup>2</sup> <b>Kim Evans</b>	Arts Council England
<sup>1</sup> <b>Norinne Betjemann</b>	Arts Council England
<sup>1</sup> <b>Hilary Boulding</b>	Arts Council England
<sup>1</sup> <b>Dawn Langley</b>	Arts Council England
<sup>1</sup> <b>Clare Cooper</b>	MMM project, Jerwood Foundation
<sup>1</sup> <b>Fiona Hare</b>	Director, Garfield Weston Foundation

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<sup>2</sup> Did not attend seminar but met separately with PAEback group members

*Government departments*

**Valerie Hannon**

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Hedra Consultants (working for DCMS on governance)