



Make: Reach: Sustain the future of the arts in Wales

Arts Council of Wales' Investment Review 2015 | 1st stage decisions

September 2015



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Front Cover

Company of trees, Helen Sear – Wales in Venice 2015



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A foreword from the Chair of the Arts Council of Wales

Dear Colleague

What has been achieved in and through the arts in Wales since Devolution is a great success story. The arts have defined the new Wales and fuelled our creativity, in all aspects, as a nation. But the publicly funded arts in Wales could be at risk.

This isn't because people don't care about them – the public are enjoying and taking part in the arts in record numbers. It isn't because the work is poor – critical acclaim and international distinction tells us differently. The arts are at risk because continuing economic pressures are forcing uncomfortable choices about which areas of civic life our national and local Government feels are deserving of support.

We know that these are difficult times. But if we want Wales, in the reiterated words of the Government, to be fair, prosperous and confident, improving the quality of life of its people in all of the country's communities, then we must make the choices, Government included, that enable this to happen. The Arts support these goals. The arts illuminate and give life to the wide range of strategies that underpin public life. From arts and health to cultural tourism, public art to town centre re-generation, the arts bring meaning, authenticity and enjoyment to our everyday lives. They create and sustain jobs, enrich education services, bring people together, improve our quality of life. The arts matter.

As the stewards of public investment in the arts, it's the Arts Council's responsibility to defend the arts, ensuring that the people of Wales can continue to enjoy, and take part in, the best that the arts has to offer well into the future. It's a responsibility we accept willingly.

Our last Investment Review, in 2010, was robust and radical – our process in 2015 has been no less rigorous in its scrutiny. Once again, our goal has been simple – to secure a vibrant and durable arts sector where the best of our artists and arts organisations can thrive, not merely survive. And this against the backdrop of one of the most relentless squeezes to public investment in recent memory.

This paper sets out the considerations that have influenced Council's thinking. From the beginning we've committed to being open and transparent. We've explained our approach and published the criteria that will guide our decision-making. In the pages that follow, we summarise the decisions that we've taken and explain why we've taken them.

Our task has been complicated by the fact that Welsh Government funding for the arts next year will be confirmed later than usual. This creates a practical problem. We're planning in the dark, drawing up a provisional list of organisations to support without knowing if we'll have the full funding.

94 organisations have applied to us for support – 67 have made the strongest case for inclusion in our revenue portfolio. We hope that the level of funding we receive from the Welsh Government will allow us to implement these proposals.

In 2010 we withdrew revenue funding from over 30 organisations. This time we propose no large-scale withdrawal of funding – our existing portfolio of organisations has performed well over the past five years. Those organisations whose revenue funding is ending will not be abandoned. Assistance will be available to them through Transition Funding and each one will be eligible to apply for Lottery funding in the future.

Today we take the first step forward in implementing the decisions of the 2015 Investment Review. And once Welsh Government funding for 2016/17 is confirmed we take step two – confirming membership of the portfolio and finalising our financial allocations. Until then, we'll be working to the very best of our ability to persuade the Government of the importance of supporting our proposals in full.

Our portfolio comprises a nation-wide network of arts organisations, from the international to the local – organisations which celebrate the best of Wales on the world stage, and those that work at a community level. It's an approach that's consistent with the arts strategy that we published last year, *Inspire*.

We're aware that the Investment Review has brought worry and uncertainty for some. We know, too, the immense amount of hard work that has gone into the preparation of the applications. Regardless of the outcome, to the organisations who submitted, we want to say "thank you".

We move forward with a clear vision for the future: a creative Wales where the arts are central to the life of the nation – a place where our best talents are revealed, nurtured and shared, and where communities across Wales have the opportunity to enjoy and take part in the best that our artists and arts organisations can offer. It is a vision of ambition and determination; one fit for a country where support for the creative and expressive arts is at the core of its identity.

We commend to you the proposals that we're announcing today.

With best wishes



Dai Smith
Chair



Nick Capaldi
Chief Executive

23 September 2015

Make: Reach: Sustain the future of the arts in Wales

We're ambitious for the arts in Wales.

Our approach is summed up in the three words of our arts development strategy, *Inspire: Make: Reach: Sustain*.

Making art, ensuring it connects and giving it a durable legacy are all part of the same picture. When we talk about **Make**, we mean artistic creation. We want to foster an environment for our artists and arts organisations so that they can create their best work. Because if we **Make** well, we inspire.

And if we inspire, people get it. They want it and value it.

So we must inspire the people of Wales to enjoy and take part in the best that our nation has to offer. Because we believe that the experience of art only happens when that chord is struck – when what is made, connects. This is at the heart of our ability to **Reach**, and crucially, to reach further than before. And if in doing this, something of worth is created in what is made or who is embraced, then we should ask how we protect and **Sustain** these things in ways that will endure.

We're backing quality and excellence.

We have a responsibility to use public funds well. So we're focussing investment on the exemplary and exceptional – those organisations who are strong and sustainable and who understand how what they do contributes to the well-being of the people of Wales.

We attach particular importance to:

- **the creation of work** – we expect the organisations that we fund to aspire to the highest standards of artistic innovation and excellence, offering new opportunities to create, exhibit and promote activity that's inspiring, exciting and compelling
- **public engagement and participation** – we expect the organisations that we fund to reach out to, and engage, the widest possible audience, tackling poverty and disadvantage in imaginative and energetic ways
- **the arts economy and growth** – we expect the organisations that we fund to be inventive and entrepreneurial, open to collaboration and joint-working, creating new opportunities for employment in the arts
- **governance, management and finance** – we expect the organisations that we fund to be well-managed, forward-thinking and business-like, fully committed to delivering value for money in return for the public funding that they receive

What has been achieved since 2010?

Overall, Attendance and Participation has increased.

In the five years since 2010, over 19.5million attendees and over 6.9million participants will have enjoyed or taken part in activities presented by members of the RFO portfolio.

Across the portfolio as a whole, levels of Attendance showed a 14.5% increase between 2010/11 and 2013/14, whilst Participation showed a 17% increase over the same period. ¹ We welcome particularly the increase in the number of people from disadvantaged communities who now enjoy and take part in the arts.

Our national companies have performed to national and international acclaim.

By and large, our national companies rose effectively to the challenge that we set in our 2010 Investment Review. They've raised artistic standards, produced exciting programmes of new work (often in new places) and attracted international recognition for their activities.

Our new approach to funding festivals has worked well.

Changing the way that we fund festivals was one of our more radical 2010 Investment Review decisions. Five years on the benefits of the approach are now evident, with stronger programming and a renewed commitment to innovation and experimentation.

Our Music Industry Development Fund (MIDF) has given a significant boost to non-classical music.

We have raised the profile of genres of music other than classical. Our desire to broaden our sphere of engagement provided the impetus for us to bring to Cardiff the highly successful WOMEX international world music trade fair in 2013. Early successes from a number of musicians and bands nurtured through MIDF has provided further evidence of the benefits of our approach.

Our Creative Producer for Dance – Coreo Cymru – has helped to encourage dance production in Wales.

In less than five years, Coreo Cymru has initiated and co-produced 15 productions, 106 professional dance artists had been involved in these projects, as well as up to 80 community dancers and 73 other collaborators from other artistic disciplines. Coreo Cymru has also played a key role in bidding for Cardiff to host the important British Dance Edition in 2016.

¹ RFO Annual Survey data 2010-2015

We have secured a major new arts and education partnership with the Welsh Government.

This is a major achievement, and one that has the potential to achieve a step-change in the way that arts and education happen in Wales' schools. This five year project is worth £20million, with the Welsh Government and Arts Council contributing equally to the costs.

We have developed a more confident approach to digital technology.

Our innovative digital research and development fund – a partnership with Nesta – has helped to grow and develop digital capacity in the arts. We're supporting arts and technology companies to work together to experiment with different approaches that embed digital working more naturally within their creative and operational practices.

We have developed closer relationships with BBC Cymru Wales and S4C.

This has led to new opportunities for artists, writers, musicians and directors to benefit from mentoring, training and the use of facilities and expertise that our broadcasters can offer, and collaboration in such nationwide events as Dylan Thomas 100

We have reinvigorated our Equalities agenda.

One of the less positive consequences of our 2010 Investment Review was that our new RFO portfolio contained only one Black and Minority Ethnic led organisation. Prior to the 2010 Review, we'd been funding three.

Council agreed to set up a strategic budget, *Creative Steps*, to nurture and develop new activity to encourage culturally diverse artists. Five years later, an outcome of this support is a new organisation, Jukebox Collective, staking its claim in 2015 for membership of the new portfolio.

In addition, we have rolled out a number of Equalities initiatives since 2010, including:

- the *Unlimited* programme – offering commissions to disabled artists
- *Hynt* the national scheme enabling easier access for disabled people and their carers to Wales' arts venues
- an *Equalities Guide*, a comprehensive information resource to help organisations to develop their awareness and practice
- funding for specialist events such as the *Unity Festival* (an international showcase for international disabled artists) and *Gwanwyn* (the arts festival for older people's creativity)
- a partnership with the Baring Foundation to support activity in Care Homes

Our Ideas: People: Places programme has piloted new ways of encouraging community engagement in local neighbourhoods.

The arts have been embedded in innovative regeneration projects as a way of empowering local communities to become more directly involved in re-imagining their locality in imaginative new ways. This, we hope, will help improve the quality of our built environment and public spaces.

The Arts Council is committed to reducing its own running costs.

After the last Investment Review, we applied the same disciplines of transformation and renewal to ourselves, making sure that more of the public funds given to us were spent on direct arts activity.

We made changes to our organisational structure, reducing the number of our staff from just over 90 full time equivalent posts to 76. This reflected the emphasis we wanted to give to areas of the arts that we'd identified as a priority. As part of that process we cut by 12% the proportion of our grant-in-aid that we spent on our running costs.

We're clear about what we're now trying to achieve

- **We're taking the bold decisions now to ensure that people's opportunity to enjoy and take part in the best of the arts is defended for the future.**
We're taking action to ensure that the arts continue to thrive in Wales. We're not afraid to make the tough calls, rewarding success and investing funds where they're most needed.
- **We're promoting Wales's international reputation for dynamism, creativity and excellence.**
We're supporting a portfolio of national companies and a range of organisations who can represent the best of Wales on the world stage – international beacons of excellence whose work is nevertheless rooted and committed to Wales.
- **We're investing in the country's economic, social, and cultural well-being.**
We're supporting the best and most entrepreneurial arts organisations – organisations of all types and size that can grow audiences, attract visitors, create new employment opportunities across the creative industries, making our towns, cities and communities better places to live and work. It's about sustaining quality of life, in all its diverse aspects, for the benefit of future generations.
- **We're transforming the places in which can people experience and enjoy the arts.**
Our Lottery Capital programme continues. Soon to be opened buildings such as Pontio in Bangor and the Glynn Vivian Gallery in Swansea should create a legacy for future generations to enjoy. We'll continue to invest in distinctive, high quality and welcoming facilities for the arts.
- **We're encouraging more people to develop their own creativity through meaningful engagement with the arts.**
We want people to take part in creative activity that stretches and inspires them – transformational projects that make the arts a more important part of people's everyday lives. Participation remains at the heart of our strategy, especially where we're able to provide activity that creates opportunities for those whose lives are affected by disadvantage
- **We're committed to achieving value for money.**
We're concentrating investment on 'front-line' delivery, allocating as much as we can directly to the arts. We're asking for more cost effective delivery – including from ourselves – encouraging joint working, collaboration and the sharing of resources and services.

Making our decisions

We've been consistent throughout the process.

From the outset of the Investment Review process we said that we would be:

- * **thorough** – applications would be assessed carefully and rigorously
- * **fair** – all organisations would be treated equally. Assessment would be evidence-based
- * **consistent** – the same assessment and decision-making processes would be used for all organisations
- * **strategic** – our decisions would be informed by the needs of the arts across Wales, and by our vision for their future
- * **transparent** – we'd explain our decisions. To help you understand the factors that have influenced the decision about your organisation, we're providing you with our assessment of your application and a copy of Council's decision paper (this document)

We asked our independent internal auditors to examine the process. They have undertaken three reviews at different points over the past year helping us to ensure that the Investment Review process has been followed correctly and consistently.

Many factors have helped us to reach our decisions

The application – and our assessment of it – has provided the essential information on which our decisions have been based. We've also considered a range of other material and evidence. (These were listed in the Investment Review Terms of Reference.)

We've had to see beyond the well-prepared application and the articulate advocacy. A competent application and a past record of solid achievement are a good start, but won't in themselves have convinced us. Our task has been to take the long view, to consider the needs of arts across Wales and to make strategic judgements based around the activity that we believe most deserves our support and how best we can resource it. This is what we've done.

National companies: celebrated on the world stage, rooted in Wales

We want strong, visionary national companies that reflect well on the creative reputation of Wales.

We want a cohort of national companies that the people of Wales can feel proud of. National organisations are important. They matter in and of themselves for the quality of the work they produce. But they matter also for what they signify. National companies are often a proxy for other things – the cultural confidence of a nation, a barometer of the strength and vibrancy of a country's arts, the willingness of governments to demonstrate commitment through the scale of their investment.

We want our national companies to enjoy international reputations.

We take this to be fundamental. It's all about the quality of the work and we'll be unremitting in our determination that national companies should aspire to be the best. But we also want them to have a clear vision of what it means to be 'national' in relation to the country that they represent. It's a mission that must be commensurate with the scale of these companies and their status within the arts sector in Wales.

We acknowledge that if we want national companies of distinction we must invest accordingly. However, the scale of this investment will also require our national companies to span the full range of activity from the international to work firmly in Wales.

We want to see approaches to arts development pioneered by the national companies that makes use of their strength, resources and expertise.

We talk in our arts development strategy, *Inspire*, of a unified approach. Nowhere is this more important than in the partnership between our national companies and the sector of which they are a part.

We expect our national companies to lead. But if our national companies occupy a pre-eminent role in the cultural life of Wales, they do so because they represent a pinnacle in creative endeavour that is fed by their interaction with a wide range of other talent and ideas "made in Wales". But we also expect them to be generous and collaborative, open to ways of working that exemplify collaboration and the sharing of resources – encouraging joint working and creative partnerships, but also driving down fixed costs through closer cooperation.

We'll be asking each national company to formulate specific proposals for developing their sectors as a requirement of our future support.

Included in our new 'portfolio' are:

BBC National Orchestra of Wales
Literature Wales
National Dance Company Wales
National Theatre Wales
Theatr Genedlaethol Cymru
Welsh National Opera
Wales Millennium Centre

We will continue to delegate Lottery funding to Ffilm Cymru as the national agency for film development and production.

Taking part in the arts: developing individual creativity

Reaching out and engaging people through community-based arts practice has underpinned the Arts Council's work for decades.

Encouraging people – more people, different people – to enjoy and take part is as much a priority today as it has always been. However, we now expect more.

We know that vibrant and sustainable communities are about neighbourhood and place. They're about the everyday issues of community spirit, safety, health and education – the ties that bind people and communities together. But they're also about enjoyment, well-being and inclusion – being part of the community, not apart from it. Taking part in the arts actively empowers people to engage in the cultural life that surrounds them. This is the territory we expect our community arts organisations to explore.

Simply taking part might be the starting point, but our goal now is to encourage a more engaged and creative involvement.

In the past, participation in community arts all too often confused doing things for people, with doing things to people. Today, people increasingly want to share, to create, to contribute. We're being invited to think, plan and work with people rather than for them or on their behalf.

So yes, we want to encourage as many people as possible in Wales to enjoy and take part in the arts. But it's not just about defending and protecting what already exists. We want to see the arts reaching more widely – in new ways and in new places – to people who've previously experienced barriers to attending and taking part in the arts.

We adopt a clear definition of community arts, articulated in *Inspire*:

“...the best community arts practice is characterised by change, authorship and ownership – work that is unique, authentic, life-affirming and transformational.”

This is work that targets the most difficult to engage, the hardest to reach in our most deprived communities; work that leads to real transformation both for individual participants and for communities.

Access to the arts is still hugely unequal because of all kinds of social, economic, geographical, financial reasons and other barriers.

We're committed to reaching a greater range of artists and communities – we want more people in Wales to be able to choose to make the arts a part of their lives.

Quality and excellence apply as much to community arts as to any other area of our work.

We've observed that the most effective community arts organisations have a talent for diagnosing the right solutions to the expressed needs of an individual or community. They are flexible and fleet-of-foot, often operating with a small core team. Led by an effective, experienced programme/project manager they will have strengths in partnership and relationship building and a deep-rooted involvement in the arts.

Several of the applications that we've received reflect aspects of community-based practice that focus on culturally diverse arts, arts and health and disability arts.

In all of these cases we've looked carefully at how the arts are used. We've always been clear that if an activity is not driven by art, it's a form of social service, or community development. There's nothing wrong with that – it's just that such activity will be a lesser priority for Arts Council support.

Arts therapies are a way of using the arts – for example, music, art, dance or drama –that help people to express themselves by creating something, such as a piece of music, a painting or a play. As a form of psychotherapy, the arts are used as a means of self-expression and communication. So the arts are as much, for us, the end in themselves as they are a means to that end.

In those cases where the arts are a discrete but not leading element of an organisation's wider activities, we'll explore alternative ways of supporting that activity.

It's possible that targeted Lottery support, tied to specific arts outcomes, will be a more appropriate way of funding these organisations in the future. Revenue funding will be concentrated on those organisations presenting a year-round programme of arts-led activity.

Included in our new 'portfolio' are:	
Artis Community Arts Alive Arts Care Arts Connection Community Music Wales Dawns i Bawb Disability Arts Cymru Head for Arts Hijinx	Jukebox Collective NEW Dance Powys Dance Rubicon Dance Theatr Felinfach Valley and Vale Community Arts Valleys Kids WJEC/CBAC (National Youth Arts Wales)

Performing arts venues: creative hubs in local communities

Wales has an important network of arts buildings.

From the largest to the smallest, they're the 'pins on the map' in their area, connecting to a nation-wide network, promoting the arts alive across the length and breadth of Wales. Overall, the geographical spread of venues is good, especially if we include those theatres and arts centres not in receipt of Arts Council revenue funding, and those community promoters supported by our *Night Out* scheme.

Artists, audiences and participants benefit from having access to creative spaces where they can enjoy and take part in arts activities. But for some venues, the daily grind of keeping the doors open is in danger of becoming an end in itself. Venues are also prey to the availability of work of appropriate scale and quality. Without content, buildings have no life – the availability of work, and the nature of it, has a direct impact on the success or failure of a venue.

This can sometimes cause tensions between promoters and producers.

Venues can be accused of being risk averse and not taking new touring product for more than single nights. And producers are sometimes blamed for creating challenging or irrelevant work that does not attract local audiences or satisfy their taste for a high quality, low risk theatre experience.

Our building based producers (Clwyd Theatr Cymru, Torch and Sherman) have demonstrated that good quality product can be both popular and sustain longer runs. However, they arguably have more direct control over what goes onto their stages. They can also allow, over a longer run, create the momentum that encourages an audience to build and grow. For many venues and producers, performances are a single date in a series of one night stands.

Perhaps as a corrective, applications to our Investment Review included a variety of initiatives designed to counteract the perceived absence of product.

We're seeing more instances of venues collaborating with producers to commission work which will tour across a negotiated network of venues. Some venues are even talking about developing an extended producing capacity of their own (with all of the associated costs that this would entail). On the face of it this offers benefits. However, we need to be sure that if new producers enter the market, we don't de-stabilise a production infrastructure that has been built up over decades (often with significant Arts Council investment).

We'll be discussing these issues further with the relevant organisations. A detailed and objective analysis is needed for any proposal to create new production facilities. We need to ensure that we are extracting the maximum value out of existing structures for production and touring before we rush to introduce new entrants.

We have a clear view of the attributes we expect revenue funded venues to display.

There are any number of venues and halls in which a performance or exhibition or film screening might take place. We're always keen to see this happening. However, our priority will principally be those organisations that are actively engaged in the cultural life of the communities that they serve.

This means a high level of engagement from the local community in all aspects of the company's work – we're looking for organisations that are valued. They'll be well-attended and alive with activity; a social as well as a cultural space. The community will be directly involved in all aspects of the organisation's work, from governance to participation in the programmes of creative activity.

The key revenue funded venues that we support will be expected to deliver a diverse, year-round programme with quality professional activity at its core.

Good levels of attendance and participation are taken as read. However, they will also demonstrate a high degree of cultural leadership, being open and generous in using the organisation's resources, facilities and expertise to support projects or initiatives that nurture and develop Wales-based talent.

Such an ambitious menu of expectations will not be possible, or indeed sustainable, in every locality.

We'll therefore focus on clearly definable areas of need where our priority will be to provide access to the arts Wales' main centres of population. An equal priority will be creating opportunities in those areas that are less well-served with arts activity (ie: not in close proximity to another similar organisation)

Included in our new 'portfolio' are:	
Aberystwyth Arts Centre Blackwood Miners' Institute Chapter Galeri Hafren Pontardawe Arts Centre Pontio	RCT Theatres Riverfront, Newport Taliesin Arts Centre Theatr Brycheiniog Theatr Mwldan Ucheldre Welfare Ystradgynlais

Exploiting the potential of theatre and dance production

In 2010 we initiated a number of changes in the way we supported theatre and dance production.

National Theatre Wales – and later Theatr Genedlaethol – captured the public imagination with innovative new approaches to theatre (especially in their site specific work), and Coreo Cymru's *Dance Dome* provided a wholly different way of experiencing filmed dance.

We introduced significant changes in the way that we supported the Theatre-in-Education sector. And elsewhere, our withdrawal of funding for Hijinx's community tour prompted the company to pursue a more focussed strategy of developing work with learning disabled actors. Dance production seemed fragmented and under-performing with a national company that felt aloof, isolated and in need of reform. In all of these areas we believe that visible progress has been made.

Site specific work has re-defined the ways the places where audiences can encounter the arts.

Large-scale public events such as National Theatre Wales' *Passion* and Marc Rees' *Adain Avion* reached large audiences, many of whom hadn't previously experienced the arts. And a range of musicians, dancers, writers and directors are enjoying the sense of uniqueness and surprise that new and non-traditional performance spaces can offer.

Whether large or small-scale, site specific work has the potential to create unique and memorable experiences. Provided that this work is widely and readily accessible – and it must be to receive public funding – it will continue to have an important contribution to make to audiences' engagement with the performing arts.

Since 2010, the former Theatre-in-Education companies have directed their efforts in different ways.

We relaxed the requirement that these companies produce schools-based productions, preferring instead to open out the market.

We expect all RFOs to reach new audiences, and we attach a particular importance to work with children and young people. We need be no more specific than that. Rather, we look to our producing companies to create the best, most interesting theatre that they can. We want to avoid any artificial divide between, for example, Theatre and Theatre for Young Audiences where one shouldn't be. It's time to turn the page with all companies feeling that they're able to play to their strengths – one of which might be theatre for children and family audiences – but they should not be limited by this. And if new partnerships can be developed that extend the range of good quality theatre, all well and good.

It used to be said that the building-based model of theatre production with an ensemble cast was inherently inefficient.

Rehearse, produce sets and costumes, run the play for a fortnight and then junk the lot and start again. Nowadays processes have become more efficient. Co-productions are more common, and we're seeing more instances of work touring after its home-based run. But are we seeing enough of this? There is potential for us to get far more value out of the assets vested in our building based theatre producers (Sherman Cymru, Clwyd Theatr Cymru and The Torch). What works well in Mold might work just as well in Milford Haven. Greater collaboration has to be a key outcome of the Investment Review.

Touring can be equally challenging.

Those producing companies who tour are finding it increasingly difficult to work within an economic model which sees them unload and then pack up a production in a new town every day, with little or no chance of developing an audience in each place.

Co-production is not without risk and will always involve some loss of artistic sovereignty. So we understand producers' desire to develop their own distinctive style of work. Marketing is sometimes haphazard, with producers reporting mixed results from venue managers, especially where it concerns venues' promotion of dance and of Welsh Language work.

It is clear that closer, creative partnership working is required.

The producing companies know their work; the Venues know their audiences. When the two combine forces, the result is far more likely to be successful with audiences, and more satisfying artistically for all involved. Venue managers and producers of work need to take collective responsibility for growing audiences. And the Arts Council needs to encourage them to do this better.

Included in our new 'portfolio' are:	
Clwyd Theatr Cymru Sherman Cymru Torch Theatre	
Arad Goch Ballet Cymru Clwyd Theatr Cymru TYP Cwmni'r Frân Wen NoFit State	Theatr Bara Caws Theatr Iolo Theatr na n'Óg Volcano

Valuing the full range of Music

There are many genres of Music.

It spans a commercial industry, high quality professional music-making in all its forms, an array of amateur activities, and music that's representative of more diverse communities. Add to this the rapidly evolving capability of digital technology to create and distribute work, and we see a sector that is fast-moving, agile and fluid.

Wales has a remarkable richness in opera and music theatre.

We have everything from main-stage musicals, to grand opera, from contemporary opera to smaller-scale touring. This is an unique range of activity that would be the envy of many other countries.

But sustaining this level of activity is challenging.

Supporting opera is not cheap, and our current investment in the artform already represents a significant proportion of the RFO budget. In considering its financial strategy, Council has agreed that it cannot allocate a greater proportion of the available funds to opera, so the best use of existing resources becomes key. It is an area ripe for partnership and collaboration. And with national audiences for opera static, some form of joint working or association between Wales's revenue-funded opera providers could only strengthen the Welsh opera 'brand', encouraging collaboration and make better use of resources. We are looking to Welsh National Opera to take a lead in addressing these issues.

Sinfonia Cymru and Canolfan Gerdd William Mathias were new additions to the RFO portfolio in 2010.

They have developed strong and impressive programmes of work, vindicating the decision taken five years ago. We expect to see them continuing to develop the reach of their activities with the entrepreneurship and imaginative that they have demonstrated this far.

Other important organisations contribute to musical life in Wales.

Wales has many other forms of classical music including other chamber groups and ensembles, amateur and community music-making and festivals.

We made a big change in 2010 to the way we funded Festival activity, creating a special Lottery fund for that purpose. This reflected our desire to have a clearer focus that would better support artistic ambition and audience development. Our Lottery-funded support for festivals will continue.

Before 2010 funding had historically focused on orchestral music and opera as two the two areas of music that most needed public subsidy.

It was an imbalance we wanted to address. Our Music Industry Development Fund – introduced in 2010 – has proved to be one of our most important initiatives, developing professional performance opportunities, investment in musicians, composers, research, training and business mentoring.

Our efforts reached a climax in the highly successful staging of WOMEX in Cardiff in 2013. A by-product of WOMEX was the Arts Council/BBC Wales *Horizons/Gorwelion* scheme. Focused on Wales based artists and bands writing, producing and performing contemporary popular music, the success of the scheme has exceeded even our most optimistic expectations.

The next stage of development is, we believe, to find a practical way of providing more consistent support to the development of non-classical music.

The question we posed in 2010 was what would support the development of the singer/song writer, the new bands or the rock, pop and urban genres other than a more industry oriented body? It's a question which remains valid in 2015 and we'll be publishing proposals, for consultation, before the end of the calendar year.

A single development agency approach might have merit. Indeed, it's been suggested that an organisation capable of representing music industry interests across a range of musical types could be drawn from the existing music development agencies. We're less sure. We'd need to be convinced that a new agency could be created from the building-blocks of an existing organisation, or organisations, in Wales. Potential candidates (trac, Tŷ Cerdd, possibly also Community Music Wales) all have distinct identities, constituencies and remit. A better proposition might be to create a new initiative from scratch. These and other options will be explored as part of the planned consultation.

We note, in passing, that part of Tŷ Cerdd's remit – the national youth performing ensembles – is currently under review.

This responsibility is shared with WJEC (National Youth Arts Wales). The model is dependent on a significant investment of funding from the country's 22 local authorities, co-ordinated through WJEC. It is an arrangement under strain and in need of reform. A Task and Finish Group has been established by the Welsh Government to review matters.

Included in our new 'portfolio' are:	
Canolfan Gerdd William Mathias Live Music Now Cymru Mid Wales Opera Music Theatre Wales	Sinfonia Cymru trac Tŷ Cerdd

Strengthening the network of contemporary visual and applied arts

The network of galleries submitting applications to this Investment Review present a coherent cohort of organisations.

We can see growth in standing and capability since the last Investment Review. They are developing individually and collectively.

Significant programmes of work are presented by Oriel Davies, the Glynn Vivian Art Gallery, Ruthin Craft Centre, Mostyn, in Arts Centres such as in Aberystwyth and at Chapter. Quality programming is also assured by some of the more modest sized spaces through Ffotogallery at Turner House, Oriel Myrddin, Llantarnam Grange and Mission. There is also growing evidence of collaboration, as for example in shared projects developed by Mission and Ruthin, or as we saw in Mostyn and Oriel Davies's joint presentation of Bedwyr Williams in the 2013 Cymru yn Fenis Wales in Venice.

The growing momentum that the sector is creating for individual artists can be seen in the connectivity between programmes like Creative Wales (and Creative Wales Ambassadors) and galleries' relationships with artists over time and at significant points in their careers. Ruthin is a case in point, being a particular advocate of Creative Wales makers and facilitating the international dimensions of Creative Wales Ambassadors. g39's WARP programme is also supporting artists to develop their careers and encouraging them to develop ideas that then translate, on occasions, into exhibition programming.

The commercial gallery network has further developed in the last five years.

But Wales still has deficiencies in the public/commercial sector and does not have anything equivalent to, say, a Modern Institute interfacing with Scottish artists and linked internationally.

Wales has UK leaders in its publically funded galleries who enjoy clear peer recognition.

Three of our Galleries/visual arts organisations are part of the PlusTate network. They would not be unless Tate considered their work in contemporary art to be of sufficient calibre to be part of such a network.

The international outlook of our visual arts sector is developing well.

Ffotogallery is currently presenting Cymru yn Fenis Wales in Venice, Helen Sears' exhibition "...the rest is smoke". And its *Diffusion* Festival, like *Cardiff Contemporary* uses the city and its spaces for the pop-up experiencing of art to potentially large audiences.

International profile is now assured by Artes Mundi who after six editions of the biennial exhibition is attracting great critical attention as possibly the most relevant of contemporary exhibitions anywhere currently in the world.

The development of Criw Celf and other pioneering programmes of education work (often delivered with the body devoted to visual arts education, Engage Cymru), means that the sector feels well placed to take its part in the next five years in helping to deliver the national plan for arts and education, *Creative Learning through the Arts*.

There are fragilities in the financing of the sector and on occasion residual problems.

Fairly modest resources are made to go a long way in this sector, but it is clear that the corrective investment from the last Investment Review has been eroded and the gallery sector looks to funding additional programming through recourse to Lottery funding.

What is striking is that the “build” of the sector continues.

Glynn Vivian’s redevelopment is moving towards completion, Oriel Myrddin and Mission stand on the threshold of more modest but important developments which in part are designed to help secure their future sustainability. Chapter’s next phase of development is exploring, amongst other things, the most appropriate model for the quality exhibition space that the centre lacks. Ffotogallery too is in search of more fitting premises to provide the quality of facility that its work deserves.

Included in our new ‘portfolio’ are:	
Artes Mundi Ffotogallery g39 Glynn Vivian Art Gallery Llantarnam Grange	Mission Gallery Mostyn Oriel Davies Oriel Myrddin Ruthin Craft Centre

Recognising value – supporting all applicants

Taken together, all of the applications that we received represent a rich resource of talent and potential.

We were encouraged by the wealth of ideas presented to us, including from those who we've not been able to make part of our provisional portfolio. This does not mean that these applications were poor. Although some were less well-developed than we might have hoped, most had real merit. We have simply had to select those who we believe presented the most persuasive case for support.

We don't ignore those who are not included in the portfolio.

Many of these organisations have developed their work through the investment of Lottery funding in specific projects. This support will continue to be available.

And for those organisations whose current revenue funding ends in March, we have set up a special Transition Fund, *Making the Change*. This will help organisations to adjust to a new model of operation without revenue funding. A range of support is available, from technical advice to financial support for restructuring. In all cases we'll do everything possible to help them to find an alternative way of continuing with their work.

After all, revenue funding is not necessarily the right answer for everyone.

Revenue funding is not a 'reward'. Neither is it the apex of some kind of funding hierarchy. It is not a guarantee of security of funding (revenue funding has to be decided each year, and often be reduced if there are cuts in Government funding). Many organisations in Wales who currently receive project funding are undertaking work every bit as important as some of our more established revenue funded organisations and they prefer the flexibility that project funding offers.

Revenue funding carries with it a wide range of expectations.

The attributes we expect to see in a revenue funded organisation are set out in our document *Strive to Excel*. Revenue funded organisations (RFOs) are those who we feel are best placed to deliver across the broad range of our arts priorities.

RFOs contribute to making Wales a better place culturally, socially and economically:

- supporting the nation's sense of pride and well-being – presenting work which is memorable, inspiring, enjoyable
- promoting quality and excellence – the best for the most
- delivering economic priorities – safeguarding jobs, boosting cultural tourism, stimulating economic activity
- nurturing creative, craft and technical skills
- promoting the reputation and image of Wales at home and abroad
- making Wales a better place to live, work and visit

RFOs reflect our Equalities priorities, helping to make Wales fairer and more inclusive by:

- offering stable, dependable day-to-day access to the arts across Wales
- tackling the barriers to engagement – challenging poverty of circumstance, opportunity and aspiration
- reaching out to some of the most disadvantaged individuals and communities
- leading by example – championing new/under-developed areas of public policy
- encouraging activity delivered through the medium of the Welsh Language

RFOs contribute across the board to a wide range of civic and governmental priorities by:

- helping us to feel better about ourselves
- counteracting the pressures of 21st century living – providing respite, reflection and enjoyment in our busy lives
- promoting prevention and aiding recovery – new approaches where the arts lead well-being and healthy living

RFOs help to achieve educational outcomes by:

- supporting learning through creativity – improving the life chances of our young people
- providing opportunities for children and young people to enjoy and take part in the arts across Wales
- raising standards of education and training, from schools to FE and HE, by offering skills and expertise of the highest calibre
- harnessing the transformational power of the arts to engage ‘hard to reach’ youngsters
- offering opportunities for training, mentoring, internships, and apprenticeships

Many prefer the flexibility of project funding.

If what you really want is the freedom to focus on more specific activity – or your activity is concentrated at a particular time of the year – revenue funding is unlikely to be the best ‘fit’. This, we believe, is the case with the small number of organisations whose current revenue funding arrangement will cease at the end of the year.

But some do want to take the next step.

During our assessment of the applications we identified a handful of organisations that showed real promise, and an appetite to take on the responsibilities of a revenue funded organisation. However, these organisations are at a stage in their development where they either lack capacity or have under-developed aspects of their activity. Whilst RFO status is not appropriate for these organisations at this time, they will soon be pressing their case more strongly. We’ll be discussing with them the possibility of a tailor-made programme of development designed to grow their confidence and capability.

Exploiting potential – getting the most out of public investment

We have an obligation to make every £ of public investment work hard.

One way of doing this is to encourage collaboration and partnership working. Some of the applications that we received hinted at innovative and potentially far-reaching proposals based on closer working relationships. In some cases we'll be encouraging partners to develop further their proposals.

Overall, however, we were disappointed in the number and the quality of collaborative proposals that we received.

With public funding continuing to be squeezed, we had hoped that applicants would be more imaginative in their willingness to explore the potential for sharing and collaboration. Comparatively few have done so.

Collaboration can have creative as well as financial benefits.

It's not just about making the money stretch further, important though this is. The creative development of the next generation of artists and companies depends on the vision and generosity of those whose position and status has been established.

We have many large cultural organisations and structures in Wales and a burgeoning sector of small artist-led and project funded companies. Hierarchies have been displaced by networks, hubs and clusters, partnerships with artists – especially younger artists – increasingly developing 'portfolio' careers. What's missing are the linkages that connect them all together.

For the smaller companies, many of the challenges are mundane and bureaucratic. The main barriers to making work, which artists identify over and over again, are time and money. Developing constitutional and organisational structures can be costly, diverting attention from the process of actually creating art. Yet without the *imprimatur* of being a formally constituted charitable organisation, most Trusts and Foundations will not even take a look.

We want to see more evidence of collaborative working that benefits sectors as a whole.

Important examples do already exist. Some organisations share premises and equipment. Mostyn and Oriel Davies collaborated to present artist Bedwyr Williams at the 2013 Venice Biennale. Many organisations offer mentoring and apprenticeships, whilst other creative partnership includes National Theatre Wales' TEAM, venues' *Dance Buddys* scheme, Wales Millennium Centre's *Incubator* and Theatre Iolo's *Associate Company* programme. We are mandating our national companies to do more. However, we want to see such examples become the norm, across the board, rather than the exception.

At this stage in the Investment Review we consider this to be unfinished business.

So this is an issue that we intend to revisit, and we'll be asking organisations to re-consider how they develop appropriate opportunities for partnership and resource sharing.

It will require, perhaps, a different type of vision and leadership – a sense of cultural leadership that spots the gaps, makes the connections and has the business acumen to turn good ideas into practical action. Because if we can, the arts in Wales will be stronger and more resilient.

Creating the opportunities for everyone to enjoy and take part in the arts

Reaching out to new audiences is one of our most important priorities.

Whether attending an event or getting involved as a participant, we want to widen dramatically the range of people who engage with, challenge and reinvent cultural and creative expression. It's this which revitalises our cultural life and is so important in reaching out beyond the known and the familiar.

We want as many people as possible to experience and enjoy the arts: to be inspired by imagination and creativity, excited by ambition and spectacle, intrigued by the new and unfamiliar. We want to increase participation and attendance across the arts as a whole – and this includes the organisations that we fund.

Access to the arts is still hugely unequal for all kinds of social, economic, geographical and financial reasons.

This isn't an acceptable state of affairs. And we were disappointed that many of the applications that we received lacked ambition and were so timid in tackling the blight of disadvantage and poverty of opportunity.

We produce our Strategic Equality Plan not just because it's a legislative requirement, but because we believe in the creative benefits of recognising the widest possible range of cultural voices. It recognises that some people may not be treated equally because they have certain 'protected characteristics': age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

A generous, fair-minded and tolerant society values and respects the needs, interests and creativity of all its citizens.

It's a society that's impatient of disadvantage that embraces equality and celebrates difference, wherever it's found. And in doing so, it promotes unity of social purpose within the diversity of cultures that makes contemporary Wales a vibrant and exciting place. Our vision is of an arts sector that's naturally inclusive and diverse, and more vibrant, exciting and relevant because of this.

Modern Wales is a multi-cultural and multilingual society within a bilingual nation.

We want to see more steps taken to meet people's expectation that they can explore the richness of their own culture, their own creativity through the language of their choice, whether as audience, participant or artist.

There are particular strengths vested in language and identity in Wales. But in the applications that we received we had hoped to see more evidence of engagement with two key opportunities: firstly, to develop Welsh language audiences; and secondly, to create work that allows the sharing and understanding of Welsh language culture by non-Welsh speakers.

Cultural inclusivity is one of the foundation stones to sustainability and well-being.

These things matter in Wales. They mean enhancing the economic, social and environmental wellbeing of people and communities, achieving a better quality of life for our own and future generations.

The Welsh Government has made a clear commitment to putting sustainability and sustainable development at the heart of government and the wider public sector. As in so many areas of civic and cultural life, the arts have a key role to play in supporting the principles of well-being and sustainability. And addressing these issues will help to create resilient communities with individuals whose lives are creative, positive and productive.

So now is the moment for the Arts to lead.

The creative impulse does not thrive on stasis. When the Arts are truly transformational, it is because they reveal new dimensions of experience that inspire us to be different – and better.

Over many decades, the publicly funded arts have been in the vanguard social equality and change. And through such a mission, more people have been empowered to enjoy and take part in the arts. It is a mission that the Arts Council will pursue through the projects and organisations that it funds.

And finally, what about the Arts Council itself?

The public rightly demands that the public institutions they fund are efficient and effective.

At a time of financial austerity we must apply the same financial disciplines to ourselves as we expect from others. So we too must meet the challenge of providing an effective and relevant professional service, but at a reduced cost.

Over the past five years we've taken a number of measures to cut costs.

This will continue. We'll be looking, over the coming months, at how we can achieve savings whilst maintaining a high quality public service. It will not be easy, but it is our responsibility to do all we can to ensure that as much funding as possible is spent directly on the arts.

The arts change and evolve, as does the world around us.

The way that we work and organise ourselves has to reflect that. We, the Arts Council, will have only a small part of the solution to the changes. But we must be prepared to be as innovative in our own business and we expect the funded organisations, to be in theirs.

We must make changes – changes that will be difficult and challenging for us.

But this won't deter us from pressing hard to find the right answers. There are always risks and uncertainties in trying to embrace a new future that can never be fully known in advance. However, with the imagination, energy and commitment of our staff, good things are possible. And with the collaboration and goodwill of partners and stakeholders, we're confident that we can work together to achieve continued success for many years to come.

We will keep you informed of our progress.

Appendix

Organisations included in the provisional portfolio of revenue funded organisations		
<p>Aberystwyth Arts Centre Arad Goch Arts Alive * Arts Care Arts Connection Artis Community Artes Mundi Ballet Cymru BBC National Orchestra of Wales Blackwood Miners' Institute * Canolfan Gerdd William Mathias Chapter Clwyd Theatr Cymru Clwyd Theatr Cymru TYP Community Music Wales Cwmni'r Frân Wen Dawns i Bawb Disability Arts Cymru Ffotogallery g39 Galeri Glynn Vivian Art Gallery Head4Arts</p>	<p>Hijinx Hafren Jukebox Collective * Literature Wales Live Music Now Cymru Llantarnam Grange Arts Centre Mid Wales Opera Mission Gallery Mostyn Music Theatre Wales National Dance Company Wales National Theatre Wales NoFit State NEW Dance Oriel Davies Oriel Myrddin Pontardawe Arts Centre Pontio Powys Dance RCT Theatres Riverfront Rubicon Dance Ruthin Craft Centre</p>	<p>Sherman Cymru Sinfonia Cymru Taliesin Arts Centre Theatr Bara Caws Theatr Brycheiniog Theatr Felinfach Theatr Genedlaethol Cymru Theatr Iolo Theatr Mwldan Theatr na n'Óg Torch Theatre trac Tŷ Cerdd Ucheldre Valley and Vale Community Arts Valleys Kids Volcano Wales Millennium Centre Welfare Ystradgynlais * Welsh National Opera WJEC/CBAC</p>

(67)

* New organisation in the revenue portfolio

Other Applicants

The following organisations will be eligible to apply for Lottery funding.

Ballet Nimba	Earthfall φ	SWICA Carnival φ
Barry Memorial Hall	Ensemble Cymru	Taking Flight Theatre Company
Bombastic	Jazz Heritage Wales	The ALOUD Charity
Breaking Barriers Community Arts	Makers Guild in Wales	The Stiwt, Rhosllanerchrugog
Butetown Artists	Mess up the Mess	Theatr Ffynnon φ
Celf O Gwmpas	Migrations	Touch Trust φ
Creu Cymru	OPRA Cymru	Wrexham County Borough Council
Dance Blast	Swansea City Opera	Zoom Cymru
Dawns TAN Dance φ	Small World Theatre	(26)

φ Existing revenue funded organisation