

## FLEXIBLE FUNDING ASSESSMENT

<b>Applicant name:</b>	Edinburgh International Jazz & Blues Festival	
<b>Application Reference number:</b>	G201001088	
<b>Amount Requested (Year 1/Year 2)</b>	£40,000	£41,000
<b>Officer's recommendation</b>		
<p>Summarise the key points of your assessment and draw out the strengths and weaknesses of the application taken together with any comments you have received from source evidence (portfolio of evidence/ internal / external consultation). Highlight any specific risks  <i>Note: The amount of information you provide here should be sufficient for the decision maker to reach a decision. As with all previous commentary boxes please do not exceed 250 words</i></p>		
<b>Comments:</b>		
<p>Based on the scant information submitted in the application alone it is hard to rate this application particularly highly.</p> <p><b>Strengths:</b></p> <ul style="list-style-type: none"> <li>- The festival is a key fixture in the jazz scene and does provide a highlight in the Scottish jazz calendar. Programming has been variable but has consistently been of reasonable quality.</li> <li>- There are good levels of earned revenue and other public funding</li> <li>- There are some interesting developments discussed in the business plan and application form but these are subject to securing additional funding and are not the subject of this application.</li> </ul> <p><b>Weaknesses:</b></p> <ul style="list-style-type: none"> <li>- No artistic programme has been provided, not even an outline of the direction, programming strand etc</li> <li>.- The festival – by its own admission – has lost track with the other Edinburgh festivals, with little audience cross-over, little impact on the festival “ ‘atmosphere’ ”, limited engagement with younger audiences, and very much appealing and marketed to the same ‘core’ audience for ten years.</li> <li>- The budgets and other financial information submitted are shockingly sparse and not supported with evidence of how figures have been arrived at.</li> </ul>		
<b>Officer's overall priority recommendation</b>		<b>LOW</b>
Lead Officer signature:		Date: 6 February 2008 Updated: 20 March 2008
Print name:	Stuart Thomas	

## Stage 2: Heads of Departments prioritise applications with advice from Specialist Advisors

1. What were the strengths and weaknesses of the application identified by the Specialist Advisors? Please summarise their comments below. What were their ratings of the importance of the application in being supported?

The panel consisted of Murray Buchanan, Paul Bream, Jim Gaitens, Rachel Nelken and Susan Nickalls, with ratings received from Marie Fielding by email.

### Comments:

- The panel identified Edinburgh International Jazz and Blues Festival's programming as safe and somewhat unimaginative, saying that it was of high – but not the highest – quality.
- Whilst the panel felt a clear artistic vision did not come through strongly in the organisation's business plan, there were some strengths in this application. However, the organisation did seem somewhat lacking in vision.
- The panel found certain areas of the business plan contradicted themselves. For example, the organisation claimed to be 'not pre-eminent in any specialist area of jazz', but in the next paragraph went on to describe 'a new product aimed at pre-eminence in specific types of jazz programme'.
- The panel acknowledged that the pre-eminence of this international jazz festival was important for the country's capital. It is a staple of the Edinburgh festivals, and fulfils a market niche.
- The Edinburgh International Jazz and Blues Festival is good at profiling young artists.
- The panel identified a weakness in the organisation's not committing to taking the festival to outlying areas of Edinburgh, and merely mentioning the idea without any plan.
- The panel requested more transparency of budgets, more accountability; and greater clarity about Edinburgh International Jazz and Blues Festival's relationship with Assembly Direct.

The panel rated the importance of the application in being supported as **Medium (to Low)**.

2. Summarise the role of the organisation within the infrastructure of the sector. Assess to what extent the organisation's vision will contribute to the department's and to Scottish Arts Council's aims: (to fulfil artists' potential, to increase participation, to place creativity at the heart of learning)

### Comments:

Historically, the Edinburgh International Jazz & Blues Festival (EIJBF) was always considered as week zero of the EIF and will celebrate its 30<sup>th</sup> anniversary this year. It is certainly a significant event and one of the foremost jazz festivals in the UK alongside Glasgow. However, it is clear from the assessing officer's comments and those of the Specialist Adviser's panel that the EIJBF needs to have much more budgetary detail and the relationship between EIJBF and Assembly Direct, who effectively administer the event is unclear. There is a view that the EIJBF has a reasonably "safe" repertoire, although it seeks to expand its reputation for the New Orleans school influence on its core programme.

It remains an important event to the wider jazz sector in the UK and its strategic importance within Scotland is also high, not least for the employment opportunities that it brings for freelance musicians. It does need to engage more with younger audiences.

**1. Fit with FXO criteria:** In Part.

**1.1 Excellent artistic vision and leadership; role within sector/support to artists:** Whilst acknowledging the significant presence within the UK and particularly Scottish jazz sector that the EIJBF represents, it is not seen as an event that particularly challenges and/or innovates. It does, however, provide employment and career development opportunities for many Scottish-based professional jazz musicians. The New Orleans focus is a welcome development.

**1.2 Improving your engagement with the public:** The EIJBF attracts a wide-ranging audience and has a core loyal following in Edinburgh.

**1.3 Good practice in the governance and management:** Questionable-the board has been in place for some time but there is little detail of its composition and/or how it operates. Also, the profit-share agreement with Assembly Direct, who programme the festival is unclear.

**1.4 Practical implementation of your equal opportunities policy; widening access:** Very little detail here with only a brief paragraph referring to Equal Opportunities in the business plan. The festival deals with a predominantly "safe" core support with limited opportunity to broaden access.

**1.5 Raising other income at least 25%:** Yes.

**2. Fit with Departmental priorities:** In terms of sector development, yes and the programme is consistently of high quality.

**3. Fit within Scottish Arts Council aims:** The EIJBF does increase participation in jazz and does support artists.

**3.** Based on the lead officer's assessment and the subsequent meeting with Specialist advisors, please rate the application (High, medium, low) summarise your reasons for assessing the application as you have (drawing out the strengths and weaknesses of the organisation and highlighting any specific risks)

**Comments:**

There are stated areas of concern within this application, not least connected to the budgets and to the current administrative arrangement. As per the assessing officer's report, Assembly Direct administered the EIJBF as part of their funding remit, but this changed when they moved from core funding to flexible funding. The stated administrative "spend" on the EIJBF by Assembly Direct was £20K but there is also a level of freelance administration available to the EIJBF. The arrangement was also on a "profit-share" basis which presumes that Assembly Direct also share any losses incurred by the event. This is unclear in the application, but it would appear that the EIJBF has an in house freelance "management team" whereas Assembly Direct are the professional promoters and programme directors.

The assessing officer also felt that too many of the proposed activities would be subject to additional funding and this would have to be clarified. Without the necessary budgetary clarification and clear evidence of what the business relationship is with Assembly Direct (ie; if the spend on admin for the event is £20K, that must be clearly evidenced and broken down) otherwise the administrative cost set against expected box office return is high.

The assessment from the Specialist Advisers is Medium-Low whereas the assessing officer rates the EIJBF as low priority. I will advise a medium rating on the basis of providing the essential budgetary information and if support is forthcoming at £20K unless evidence of the additional £20K spend is made available.

**1.1 Application rating: Medium**

I have considered both the assessing officer's recommendation (Low) and the Specialist Adviser's assessment (Medium/Low) and would assess this application as medium.

**1.2 Reasons for assessing at this rating:** The EIJBF is an important element within Edinburgh's festival portfolio, but I would want to see a more imaginative programme and more challenging and innovative repertoire for an event that enjoys such a prominent Week Zero slot.

**1.3 Strengths of application:** It's reliable output.

**1.4 Weaknesses of applications:** Lack of specific programme detail and budgetary information. Also there is still some confusion over the exact relationship between the EIJBF and Assembly Direct and more clarity is sought.

**1.5 Specific risks associated with the application:** As above and the lack of real budgetary detail.

**1.6 Development areas identified:** A more challenging and engaging programme and attendant profile with a much closer synergy with the Edinburgh festivals portfolio.

**1.7 Recommended level of support:** £20,000 both years.

4. Please comment on the geographic reach of the programme

**Comments:**

**1.1 Where will the activity/programme take place?** Predominantly within the city (Edinburgh), but more activity could take place in the surrounding suburbs of the city. Input from overseas to the EIJBF is, however, considerable.

**1.2 Where will the audience come from?** As above.

<b>Head of Department's overall priority recommendation</b>		<b>MEDIUM</b>
<b>Head of Department's signature:</b>		<b>Date: 15 February 2008 Revised 21 March 2008</b>
<b>Print name:</b>	<b>Ian Smith</b>	

<b>Stage 3: Collective Heads of Department (Arts Development Managers) make recommendations to Directors (Acting Chief Executive, Depute Chief Executive and Co-Directors of Arts)</b>		
1. Summarise the reasons why the final rating has been made.		
<b>Comments:</b> Some fit with FXO criteria but relatively weak in comparison to others, in the context of a highly competitive funding round. Not recommended for support.		
<b>Collective Heads of Department (Arts Development Managers) priority recommendation</b>		Low Medium
Chair of Meeting signature:		Date: 2 April 2008
Print name:	Iain Munro	

<b>Stage 4: Directors make recommendations to Joint Board (strategic fit)</b>		
Record the Directors' recommendation and confirm the suggested level of support. If the recommendation differs from Stage 3, please summarise the reasons why.		
<b>Comments:</b> Agree with Stage 3 recommendation and comments.		
<b>Directors recommendations to Joint Board</b>		Low Medium
Acting Chief Executive signature:		Date:10 April 2008
Print name:	Jim Tough	

<b>Stage 5: Joint Board's decisions</b>		
Record the Joint Board's recommendation. If the recommendation differs from Stage 4, please summarise the reasons why.		
<b>Comments: The Joint Board agrees with the Stage 4 Recommendation.</b>		
<b>Joint Board Final Decision</b>		<b>REFUSE</b>
Date: 24 April 2008	If approved for support, enter sum awarded	£

**End of Assessment**