

ASSESSING QUALITY IN THEATRICAL PERFORMANCES: IS MEASURING EXCELLENCE POSSIBLE

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ABSTRACT

This paper considers whether it is possible to assess the quality of performance art, specifically dance. It reports part of an empirically based research project that examines the effect of the changes in funding on the performances of the five largest UK publically subsidised touring dance companies from 2008 to 2018. The research question is “Have the changes in funding caused changes in the quality of the performances and the scope of the repertory?” Consideration of the funding is complete, concluding that funding has changed significantly. Research progresses to consider whether the funding changes have influenced the quality of the performances and the scope of the repertory. Quality analysis is the major theme and some possible methods are discussed for both performances and repertory. Means of assessing repertory are available, but judging performance quality is difficult, and no fully satisfactory method has been identified.

Key Words: Performing arts; funding; dance companies; quality assessment; repertory assessment.

Introduction

This paper reports “work in progress” on an empirically based research project that examines the effect of changes of funding on the performances of the five largest UK publicly subsidised touring dance companies. The research question is “Have changes in funders and funding caused changes in the quality of the performances and the scope of the repertory performed?” The investigation of funding is complete, concluding that there have been major changes to funding and the sources of funds. The issue that remains is how these changes might have affected the quality of the product of this performance art, the dance performance and the repertory. A subsidiary research question is “How should the quality of the performances and the scope of the repertory be assessed”?

The research project is focussed on the operations of five dance companies for the ten consecutive seasons from 2008/09 to 2017/18. This was a period of relative stability between the global financial crash of 2007/08 and Brexit in 2020. A mixed methodological approach was used to consider quantitative and qualitative indicators as potential means of assessment. From 2008 to 2018 there was a steady decline in the value of the public subsidy, and the companies had to seek additional sources of income in order to maintain their finances.

All five companies had complex systems of multiple funding, and some key issues emerged to provide possible areas for investigation. Had their funding changed in total and in real terms over the decade 2008-2018? Had the balance of funders changed, and were those changes significant in terms of funder influence? It was established that there have been changes in the levels of funding, in sources of funding and differences in the balance of the various funders. The question arises as to whether there had been any related changes in the quality of the performances. Two aspects of the performances will be considered: the quality of the performances; and the quality and scope of the repertory

Context

“The economics of ballet is impossible to understand without understanding its history, its heritage and its working” (Schimmelpfenning, 2003 p. 85). While there is no need to delve too deeply into the context of ballet and dance development and delivery, there are some important features of the operation of these five dance companies which should be emphasized. Firstly, they are touring dance companies, and the primary function for which they are accorded modest but diminishing support from the public purse, is to make their art-form available to as many members of the public as possible. Touring, particularly of major dance productions, is very expensive. Wright (2016) commented that it cost £150,000 per week for [the company] to be “out on the road”.

Another important element of the operation of touring dance companies is that their performances are the final stage of the creative process. The process starts with the creation of the choreography. A development stage follows with the quality built into the work as the process progresses. Usually the choreography will be blended with selected or created music. For most productions, designs will be needed for scenery, costumes and lighting, and their testing and possible adaptation. The process proceeds to rehearsals, dress rehearsals, early performances and possible “tweaking” as needed. This follows the standard procedure for theatrical performance.

The significant feature of the performances of touring dance companies is that they will be given in theatres in major regional towns or cities, and will compete for consumers, an audience, with other theatrical entertainments, and indeed other entertainments. They operate in the open market, competing with available competition to attract consumers, which means this research needs to consider its delivery to the consumer as a part of the commercial entertainment industry. The research project becomes trans-disciplinary.

Methodology

The dance companies on which this study is based include four classical ballet companies: English National Ballet [ENB]; Birmingham Royal Ballet [BRB]; Northern Ballet [NB]; and Scottish Ballet, [SB], and one contemporary dance company: Ballet Rambert (previously Rambert Dance Company) [RDC]. All the companies are designated as National Portfolio Organizations, [NPOs], and are awarded ongoing funding from the Scottish Government in the case of SB, and from Arts Council England [ACE] for the other four companies.

When considering whether to investigate the funding of performing dance companies, it appeared to be prudent to check the availability of the necessary data, since much of the required information, if not already available, would be difficult to generate. Fortunately, all the UK dance companies, are registered companies in the legal sense, and are required to present an annual report with full financial accounts to Companies House. The financial figures so presented are in the public domain and generally adequate for the purposes of this research. The records also contain some details of other

aspects of the operation of the dance company such as the number of the performances given, dancers employed, salaries of senior employees etc. More information is available from company literature or the material in specialist journals. The company may also be willing to assist the investigation by giving information and/or interviews. The initial approach to the investigation was therefore to compile databases for each of the five companies and arrange discussions with senior managers.

Annual company reports also state the organization policies as defined by their directors. This are usually in the form of a “Mission Statement” which summarises the objectives of the organization. My first approach to an examination of an organization is to look at its stated objectives (often very general and rather pious) and check the confluence of reality and ideality. All five dance companies follow their mission statement objectives carefully. Delivering top quality performances is a primary objective.

The methodology is therefore to collate and analyse the quantitative data gleaned from the sources mentioned earlier. This provides a foundation of factual information. The financial records supply numerical information with a high degree of accuracy. When moving on to the quality of the performances, a mix of quantitative and qualitative investigation is employed.

Literature Review

When examining the arts culture literature at the start of this project in October 2018 it was clear that very little interest had been shown in dance, although this was a major area of performance art in the world with companies such as the Royal Ballet, Paris Opera Ballet, New York City Ballet, American Ballet Theatre, the Bolshoi and Kirov companies of Russia and more including many contemporary dance companies. Del Barrio-Tollado & Herrano-Prieto (2021) noted that the dance sector was: “an area which has received scant attention in economic literature so far”. No studies were found concerning touring as a means of bringing the art-form of dance to a wider public. I was advised to search on a broader basis for supportive material from within the performance arts area, and there was certainly some useful material concerning opera and drama. Though this situation has advantages in that any investigations in this area will certainly be original, it does present the problem that few building blocks of a foundation for research are available.

However, in the period 2018 to 2024 the dance sector of the performance arts has been recognized by the academic community as a fruitful area for research. Perhaps more useful material has been published in the past six years than in the earlier period. Even so, although he did not deal specifically with dance, the work of Bourdieu (1992/1996) on the field of cultural production and on habitus provide a fundamental base. Also, the relationship of the arts with the rest of world activity as analysed by Becker (1982) has broad relevance. More useful material concerning assessment of the quality of performing arts is available in recent literature, and some examples will be considered in the Discussion section. A detailed update and review of the literature is in-hand.

Funding

Initial financial investigations have indicated four primary sources of income for all the companies: Box Office revenue; Grant in Aid (public subsidy); donations (sponsorship and philanthropy); and trading (exploitation of the company’s physical and intellectual resources). There has been a steady increase in Box Office income, modest increases in trading income, and a major increase in donations. The real value of public subsidy, both from national government, ACE sources, or local government, has declined consistently. Quantitative evaluations indicate that all companies generally maintained

their level of income, addressing the gap caused by declining subsidy by developing alternative strategies of income generation.

Repertory and Performances

The scope of the repertory presented, and the quality of the works performed is now the major research activity. The repertory depends on the policies adopted by the Board of Directors of each of the companies. They are strongly influenced by the appointed Artistic Director and the Chief Executive of the company. All five companies have adopted this dual system of management (Reynolds et al 2017), although in one case an Artistic Director added the responsibilities of the Chief Executive to his duties during the period of this research. Among many other constraints and influences, the availability of resources is a major determinant of what can be achieved, its scope and quality.

A database of almost 5000 performances has been compiled (autumn 2023), some 3,500 of which have been identified as touring performances of the full company in pursuit of the policy of bringing dance to a wider public. These performances are being analysed to identify any significant changes during the research period. The companies give other performances, for example overseas tours, performances of experimental work and in special locations, new choreography evenings to give opportunities for dancers to test their ability to choreograph, educational demonstrations, and programmes specifically developed for children.

Some aspects of the output of the dance companies can be measured quantitatively, and are relevant to the quality of the performances and/or the scope of the repertory. These include: the number of performances given; the locations to which the company tours; the number of works presented; and the number of performances of each work. Assessments such as the quality of the performances, and the quality of the repertory, are qualitative.

The tendency for such assessments to be converted to metrics is strongly denounced by Meyrick et. al. (2018): “When did culture become a number?” Their first conclusion is headed: “Not Everything That Counts Can Be Counted” (p. 126). This work focusses focusses on the *value* of culture, broadly its benefit to the community, which is a major justification for support from the public purse. This is too difficult an area into which a newcomer to arts management research might venture. The quality of the cultural product is germane to this project, but determination of its *value*, though very important, is for others to tackle. The terms used in this paper are defined as follows:.

“*Organizational Performance*” is an evaluation of the performance of the dance company as an organization - the product of its activities and what it presents to the audience, its customers, and its use of resources, basically the same as the evaluation of the performance of a business.

“*Performance Quality*” is an assessment of the quality (excellence?) of the performances given by the dance company. The pursuit of artistic excellence is prominent in the policies of the dance companies being studied.

“*Performance Value*” is defined as the contribution the performance makes to the quality of life of its recipients and the community.

Repertory

All four classical ballet companies have repertories based broadly on three categories of ballets: 18th century classics; 19th and 20th century “Heritage” works (ballets regarded as major contributions to

the art-form and worthy of retention); and new choreography of the 21st century which provides the innovation an art-form requires. RDC, as a contemporary dance company, has different policies which are focused on innovative work, and its repertory has a high proportion of very recent choreography.

Some quantitative methods of examining any changes of scope have been identified, for example the number of performances; number of works presented, number of venues visited etc. This approach is dependent on the availability of data and access to it, and generally the companies have been very helpful in this regard. Potential measures of scope are being tested this year on some or all the companies' repertories as appropriate. The methodology for the examination of repertory scope is to categorise the works in the repertory, and look for significant changes during the ten year period.

Potential models to assess a repertory have been developed for consideration:

1. Mission Statement Model

The classical companies generally aim for a balance between classics, heritage works, and new creations. Works which have known box-office appeal are often added to ensure financial stability.

Contemporary dance companies tend to concentrate on new work, and may not be too concerned about any need to care for heritage works that were at one time part of their repertory. Assessment of their repertory will be focussed on the frequency that new works are created and performed.

2 Classical Ballet Model of Birmingham Royal Ballet

The text of Howells and Armstrong (2010) lists the works presented and divides them into 7 categories. The categorization is in some respects specific to BRB. The number of works presented does not represent the number of times a particular work was performed, as some popular works appear frequently, and many new works have a short lifespan.

3 Bull and Jennings Model (Bull and Jennings, 2014).

This model is based on a book by the ballerina and academic Deborah Bull and the critic Luke Jennings. It identifies 13 categories generated from historical, geographical and creative centre bases. Though interesting from an artistic perspective, this model would be far too complex for scope analysis, but can be simplified by more general grouping.

4 Simplified Bull and Jennings Models

By collating some of the categories used by Bull and Jennings, 7 or 5 category models can be developed, and might be more tractable as an investigation tool. Further simplification will reduce the categories to 3: Classics; Heritage; and Modern, the same as the first model based on the mission statements, matching the policies adopted by the classical dance companies. This provides a simple analytical tool which is being trialled. The categorization might also be allocated an era of creation: the Classics in the 19th century; the Heritage works in the 19th and early 20th centuries, and the Modern works in the late 20th and early 21st centuries.

Analysis of the repertory of the contemporary company, RDC, will be based on the specific policies of that company with its emphasis on the presentation of new work.

Performance Quality

Determination of the quality (or excellence) of a performance generates many issues and problems. Qualitative and quantitative methods have been suggested, and some have been considered for this aspect of the research. None appear entirely satisfactory and all have some limitations. Throsby (1994) observed that although the quality of an art-work was of great importance, the assessment of quality was very difficult: “a mine-field”. Hume (2000) shows that analyses based on consumer attendance may not be wholly representative of the performance quality rather than of the experience of the visit to the theatre. Radbourne et. al. (2009) list 8 traditional measures of quality, but advocate 4 more related to the audience experience. Chiaravalloti (2014) suggests more needs to be done by accountants. Labaronne & Trondle (2020) consider how quality is developed during the creation of dance works, a process which will be recognized by those familiar with Total Quality Management [TQM] as practised by commercial organizations keen to improve their products or services.

Many researchers assessing the performance of arts organizations have argued for the use of a “Balanced Scorecard” approach. Gilhespy (1999) comments that many aspects of performance and the company’s operations are incorporated into the evaluation, with a weighting accorded to them, but only a few are significant. Turbide & Laurin (2009) argue that this approach is often too heavily weighted on financial performance. Lin & Lin (2019) conclude that so many elements have been added to the Balanced Scorecard as to make it unworkable, and advocate the use of Box Office income as an indicator of quality. However, this quantitative method incorporates elements of quality and popularity which could invalidate it unless a purely commercial perspective is used. It has been suggested that grant aided arts organizations do not sit comfortably or wholly in the not-for-profit sector, in public services, nor in commercial entertainment, implying a plurality of customer’s expectations. This acknowledges the cross disciplinary problems of an activity which is born in the area of creative performing art and progresses to delivery of performances in the area of commercial entertainment. The Balanced Scorecard is more an assessment of a dance company’s performance as an organization than an indicator of the artistic quality of its performances.

Box Office income is a measure of the reward given to the company by the consumers of the performance art. Many might regard the income from the consumers to be the best indication of the quality of the product. This would certainly be the view of the delivery process of a purely commercial product or service. The marketers would pay particular attention to what the customers were willing to pay. With Box Office income, there are other quality issues. The quality of the seat for the performance varies according to its position in the theatre, and the ticket is priced accordingly. The better the view of the performance, the higher the price. The management can claim that they allow admission regardless of the income level of the customer, but introduces a variance in quality for the experience of attending the performance.

Could attendance numbers provide a better option? These can be generated from the Box Office figures merely by counting the number of tickets sold. This count would probably be a better indicator of the quality and popularity of the performance, but still remains a mixture of these two elements which attract the consumer. It can only be taken as an indicator of performance quality if it is assumed that the popularity of the show is directly related to the quality of its performance. Also, the companies do not generally publish attendance figures as a standard procedure. It may be possible to obtain such figures assuming the goodwill of the marketing personnel, and assuming that they are conveniently available. Or it might be possible to obtain the data from other sources. This is being investigated.

The marketing departments of dance companies are very aware that some dance works are better known to the public than others. Referring to his time as director of the Royal Opera House in

London, and the programming of the Royal Ballet, Jeremy Isaacs noted that it was easy to sell tickets for works such as *Sleeping Beauty* or *Swan Lake* and less easy to attract audiences for triple bills of less well known works (Isaacs 1999, p. 86). This marketing situation remained unchanged during the research period and still applies.

Quality can be assessed by the audience members, and their views gleaned by surveys. The criteria and expectations of audience members and critics can be widely varied. Baldin & Bille (2023) have noted the heterogeneity of both audiences and critics identified sub-groups of audience members (inexperienced; conventional connoisseurs; and unconventional avant-gardes) in studies of opera performances. Dance marketers have observed core audiences of regulars, with the addition of first-time and occasional attenders.

The reviews of critics are published in the more serious newspapers and in specialist journals. A popular method of summarizing critical opinion uses a five element Likert Scale which awards up to five stars according to the quality of the performance, for example: 1* very poor; 2*poor; 3* adequate; 4*good, 5*very good (Throsby, 1994, p.73)). The summary, though it has a nominal numerical basis, is entirely subjective, and therefore a qualitative assessment. As critics give “expert” opinions, these may not concur with those of audiences whose individuals hold diverse opinions analysable only by broad surveys. History records some spectacular errors in the critical assessment of new dance works, (Kauldhar 2023).

A number of quality assessment options have been identified and are being considered, including those based on retrospective critical opinion; public regard; and commercial viability. These will be evaluated, aiming to find a potential way forward.

1. Number of performances scheduled and given

The number of performances given of a particular work could be regarded as a good indicator of the quality of that work. Such an assessment has the advantage that it would be based on a quantifiable measure, and data is available. However, this assessment would also incorporate popularity and some awareness of the work. Popularity with the general public may not be the same as the views held by the knowledgeable members of the artistic elite. The potential audience numbers will be related to both the potential catchment area of the performance venue, the capacity of the venue, and the known popularity of the work. It would also be the foundation for the marketing of the works performed, and the number of performances scheduled.

2. Tickets Sold

The number of tickets sold at the Box Office would give a quantitative measure of the opinion of the paying customers, but would also be subject to the influences indicated in 1. above. It would be more accurate in that it is free of the marketing estimations of take-up, with their attendant element of guess-work. The data for this analysis would be available but might be considered commercially sensitive and therefore confidential.

3. Balanced Scorecard

The Balanced Scorecard is popular with some academics, but criticised by others, as mentioned earlier. My view is that it is more an indicator of the performance of the company as a non-profit organization.

4. Assessment by Company Artistic Staff

A valuation by the company's artistic staff would give high quality expert analysis. It would allow an assessment of the general quality of the work, and be free of the variations that might occur from performance to performance. However, these experts might not be willing to express limited appreciation of works which have been created or introduced by senior artistic staff.

5. Delphi-style Analysis of Past Evaluation by Arts Critics

This analysis is based on an evaluation by expert critics of new work at its first presentation or revival. The methodology is an adaptation of the use in ancient Greece of the advice of the "oracle" at Delphi on the possible outcome of an expedition or political action. The probable generation of advice was that the priests at Delphi were shrewd, made sensible evaluations of possible success, and developed a high proportion of correct answers. When their fame spread, they were regularly consulted. They might be regarded as the earliest recorded team of management consultants.

In the 1950s, the RAND Corporation developed a technique to make predictions on complex issues of technological forecasting. This was also useful for the evaluation of other messy issues. It involved identifying a group of people with expert knowledge of the subject; developing a questionnaire for them to consider; analysing the results; and reiterating the process 2 to 5 times. This is a lengthy and expensive process, but can produce valuable results (Delbecq et al., 1975), VanGundy (1988).

Adaptation of this technique to assess quality could be to identify a group of critics, for example those who regularly review performances for specialist journals or major national newspapers, and analyse their reviews of works performed during the 2008 to 2018 period. I trialled this method on critiques of contemporary performances in the London theatre (Reavill, 2000), and have done some preliminary investigation of the viability of a historic version of this process based on the repertory of RDC. This repertory was chosen because its structure is much simpler than that of a classical ballet company.

The limitations of this method include identifying critics with an adequate level of expertise to join the Delphi team. Assessment of quality is very subjective, and even the most revered critics have been proved wrong in their valuation of major works at their first presentation. The distinguished critic Clive Barnes made adverse comments on Kenneth MacMillan's *Manon* at its first performances. It is now regarded as a masterpiece, and is in the repertory of most of the major ballet companies of the world. Records of critical comments are limited, and how should they be selected, and how should they be evaluated?

6. 3Ms Age Test

The 3Ms company, (a major USA mining and manufacturing organization) is very aware of the "Product Life-cycle" theory which is well supported by practical evidence. 3Ms invests heavily in product orientated research to identify new products to replace those which are losing customer appeal. It aims to have 25% of its products designated as "new", defined as launched within the past two years. The date of the first presentation of a new performing arts work could be a launch date. The average age of the repertory might be used as an indication of the degree of novelty. However, it would not be appropriate for the classical companies which generally have policies to present the classics regularly, and also to maintain performance viability for "heritage" works.

A performing arts product could be newly presented, but might have limited innovative content. New works presented by current choreographers are sometimes criticised for being "more of the same". Also, "Heritage" works, those regarded as works of high quality, could be maintained in a repertory as

benchmarks for the quality of new works. This suggests that the opposite of the 3Ms age test might provide an option.

7. The Long Life Test

The classics of the 18th century are highly regarded for the beauty of their choreography, and their ability to help dancers gain high standards of performance. They are also very popular with the customers. There are many popular 20th century works, particular three-act “blockbusters” such as Ashton’s *La Fille mal Gardée*; MacMillan’s *Romeo and Juliet*”; Cranko’s *Onegin*; and Balanchine’s *Jewels*, but also other works both highly regarded and popular.

None of the methods considered so far stand-out for use as an indicator of the general quality of the repertory to identify whether changes of funding have caused a change of quality. All appear to have advantages and disadvantages, so there is a need to consider whether such an assessment is viable.

Discussion and Conclusions

All the dance companies have coped reasonably well with the diminishing levels of ACE and Scottish Government funding, and have generally maintained their funding levels and standards of production. The gap in income caused by the reduced subsidy has been replaced mainly by donations, particularly by fund raising from philanthropic sources. Examination of the financial records, with appropriate correction for inflation, indicates that some companies have even increased their total income. The extent to which the companies lost public financial support varied. RMC, recipient of the smallest ACE grant lost less proportionally of its ACE grant. BRB had the largest loss of public funding due to the progressive reduction of its support from local government.

Box Office income generally increased, and there was some positive development in the trading activities of the companies. There is some evidence that the programming of performances and repertory has been influenced with more care taken to ensure that attractive programs are presented, and that the tours are well marketed. Evidence to support this preliminary conclusion is still being collected. A possible problem area that has been identified is that triple bill programs are regarded as more difficult to sell, and that “new work” can be high risk. Regardless of that, the companies have continued to add new works to their repertory, and the extent of the innovation is being assessed.

No evidence has been found of any increasing influence by donors on the repertory, though some major donors like to check the details of the works that they are asked to sponsor. All the companies follow closely the policies of their Board of Directors as displayed in their mission statements. The contemporary dance company RDC continues to produce new work, and this is being studied using the “3M’s Age Test”. However, they have some fine works in their “back catalogue” which could (and maybe should) be seen more frequently, if only to act as bench marks with which to compare the new works.

Most academic investigations of the Arts and Culture sector approach the task with support from an appropriate theory. I recall an incident at an earlier AIMAC conference in which a senior academic introduced her presentation with a reference to a particular theory as a lens for her paper, adding as an afterthought “unless anyone can think of a better theory”. This made me wonder whether the choice of a theory was an aid or a constraint. Is it wise to rely on one theory when examining a complex issue?

Consideration of theory was not neglected and a list of potentially useful theories was compiled. These include Resource Dependency Theory; Agency Theory; Open Systems Theory; Contingency

Theory and the Economic Dilemma Theory of Baumol and Bowen (1966). The possible contribution of theory will be re-examined in relation to the final conclusions of the research when all the data has been analysed.

At this stage of the project there are few conclusions, though it has been established that all the companies have experienced significant changes to their funding, and that they have compensated for reduced grants of public money by expanding other income sources. Details and analysis are complete for all five companies. Means of assessing repertory change have been found, but an acceptable method of quality assessment is yet to be identified. Methods will be tested, and their possible use as indicators evaluated.

Potential areas for further research are clear, particularly the concept of employing touring dance performances to expand the catchment area and allow more of the population to experience classical ballet or contemporary dance. The touring program can be onerous for the dancers, and touring is expensive and labour intensive. The wide variety of tour theatres, particularly their audience capacity and stage area, could influence the quality of the performance. This is not as yet being investigated.

It has been suggested that grant aided arts organizations do not sit comfortably or wholly in the non-profit sector, in public services, nor in commercial entertainment. This confirms the cross-disciplinary problems of an activity which is born in the area of performing art and progresses to the delivery of the outcome into the area of commercial entertainment.

The repertory of the four classical companies is now being reviewed using the basic “3 category/mission statement” model. The initial analysis suggests that all the companies are keeping to their policies of maintaining a balanced repertory. More evaluation will indicate how well each company was able to do this. The observations of Nicholas Hytner, (2017, p.3) though concerned with the development of a new play at the National Theatre, are germane for this objective:

“The playwright, the actors and I spent the short rehearsal time left to us trying to reconcile our high ideals with what is achievable. We want to make arts, and we know we’re in show business. It’s one of the balancing acts the National Theatre (is) about”

The “balancing act” also applies to the selection of repertory for the UK’s touring dance companies. Their primary objective is to make top quality art, but they must remain financially viable to do this.

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