

Pathways 2022 Workshop 2: 6 April 2022

Planning for Renewal and Regeneration – Reflective Summary

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As part of the Arts Council's Pathways webinar series, I was approached to develop a session exploring change and succession planning among festival-makers. The task was to try to open up discussions about what is often a sensitive topic. In discussion with the Festival Adviser Dr David Teevan, the scope of the session also had to consider different festival structures and sizes, different forms of renewal; encompassing change at board and executive/artistic leadership levels, as well as considering volunteer-led committees and volunteer delivery teams.

Change is an uncomfortable topic. It exposes diverging perspectives of the same experience. While the focus of the series was on organisational sustainability and planning for the future is an intrinsic part of that, change and succession also raise complex personal relationships within festival-making. Every festival and every individual involved in that festival will respond differently. I made the decision to run the session as a workshop, using a questioning strategy which could prompt reflection and introduce different perspectives on the topic. In this way, the purpose was to enable participants to initiate thoughts and conversations rather than arrive at conclusions.

Approach

The workshop took place online with a capped participation of 45. The structure was built around 3 open questions:

- **Q1 Who decides?**
- **Q2 How long is too long?**
- **Q3 Who takes over or how can exit/change happen well?**

To support discussion in the online setting, the group were split into 3 breakout rooms twice during the workshop: first to discuss Questions 1 and 2, and then to discuss Question 3. Each breakout session was facilitated by an independent facilitator. At the end of the workshop, all participants came back together to reflect and share. The 3 facilitators (Tony Reekie, Jenna Hall and Jon Price) were selected as individuals with specialist knowledge of festivals, succession planning and leadership change. This mirrored my own background as a contemporary researcher of decision-making in cultural organisations and my past as a festival-maker. Each facilitator was asked to report back at the end of the workshop on general themes and contribute a short reflection after the workshop. The content of each breakout discussion was kept private to encourage everyone to

feel able to speak freely, but there was space within the workshop for the whole group to offer thoughts and reflections. Ground rules were set out at the start of the workshop to encourage respect and confidentiality.

Reflections

Questioning strategies when used as planning or thinking exercises are useful to open up discussion. Participants can reflect on their own responses privately or share responses with a group to form new ideas and share knowledge. While they can often produce uncomfortable thoughts, they can also reveal multiple new or surprising perspectives. Crucially, they can enable those who work together to engage in difficult or emotionally-charged conversations with common goals: clarity, shared and respectful decision-making. The different facilitator summaries and the thoughts offered at the end of the workshop suggest most participants had gained something from the discussion or thinking it provoked. Inevitably, such a big topic could not be addressed within a 2-hour workshop, nor could it support any individual festival to engage in the discussion around their own unique circumstances. Through some 'rules' set out at the start, participants were encouraged to 'sit with the questions' rather than rush to answers or solutions (for their own context or someone else's). It is hoped this 'sitting' allowed an appropriate space for reflexive consideration and prompted discussion among staff and voluntary teams, boards and committees in the aftermath of the workshop.

Key points of observation

1. The cyclical nature of festivals is quite unique and gives space for periods of reflection. However, many of the participants also saw the restrictions of a fixed point in the calendar and expressed problems with capacity. There has clearly been change in the policy environment (through AC's festival policy and funding approach) which has enabled some festivals to consider alternatives to this relentless cycle. However, there was also a sense that festivals were negotiating other expectations and this could at times inhibit planning for change or looking ahead. One group in particular articulated the need for succession planning to be balanced as a more regular part of planning discussions rather than a one-off. This might suggest that the challenge is not just having the conversations, but normalising discussion of change and future as part of everyday festival making.
2. Certain points from my talk sparked facilitated discussions to go in different directions. A response to the questioning of 'habits' or norms (explored loosely through Questions 1 and 2) brought about reflections on who made decisions and how. It also prompted thoughts about why programmes were put together or happened in the way they did. Perhaps more deeper discussion could grapple with the question of when a festival's time is at an end.

However, as with the acknowledgment of the personal nature of succession, the question of closure, definitions of success or legacy are emotional and personal.

3. While many of the emerging themes of discussion overlapped, the question of who made decisions highlighted the relational nature of festivals (indeed all organisations). At times, this was positive showing the significance of a common vision, camaraderie, commitment. At others, this was felt negatively as power and responsibility was unevenly distributed or relationships were set up that treated criticality as criticism. Many nuances such as the complexity of volunteer; staff relationships; over-reliance on personalised stakeholder and contact management; unpredictability of external relationships came up depending on the type of festival structure. This highlighted the need for this topic to be opened up to collaborative discussion and decision-making.
4. Most significant it would seem in all the discussions was the acknowledgment or indeed permission to recognise succession and change discussions as emotional, personal and also relational. The common themes of 'trust', 'passion' and 'burnout' highlight that if festival success relies on the individuals, their capacity to grapple with the future is equally personalised. Comments varied from agreement that no one is irreplaceable to the acknowledgment that founders or longstanding team members often have such nuanced relationships and skillsets that no one person can take over. The fear of change but also anxiety about handing over responsibility came up multiple times. Even those with the best laid plans reflected on the mixed emotions provoked.

Conclusion/Final Thoughts

I would like to think that this workshop responded adequately to some of the needs identified for this latest Pathways series. Sitting within a programme of other workshops and talks, it hopefully enabled different festival makers to have some shared reflection and sparked some thoughts about next steps. I would like to thank the facilitators - whose reflections can also be viewed here and whose sensitive approach enriched the session.

Normalising discussions of succession and change in every day planning is critical. Next steps for many organisations may, of their nature, need both external facilitation and privacy. Some of the relational issues that emerged (letting go, changing habits, having diverging views, experiencing burnout but also being unable to see successors/collaborators) meant that practical 'good governance' could not be separated from personal feelings and relationships. As a next stage therefore, it would be useful to consider how individual festivals might be supported to have those conversations internally and with stakeholders. It would also be useful to consider what barriers and opportunities exist to normalise such discussions (both internally and externally).

Reflections from Facilitators

Reflection 1: Breakout Group 1, facilitation and notes by Jenna Hall

Question 1 & 2 - Who decides and how long is too long?

Change/growth:

- Faced the issue of the leader/founder moving on, how to manage the risk.
- How best to move to a model of paying people to take responsibility for particular actions/roles etc.
- New members/growth/expansion/new ideas were common threads of things that are proving challenging, but they know are important and could/should be positive changes.
- Consensus decision making was the norm for a number of groups. There was recognition that this gets harder as the group gets larger. One participant talked about making 'pie slice' decisions. One person, at the point of the slice, gains consensus from the people in their slice then all the points come together and agree the decision.
- There was recognition of a need to attract new perspectives/people/opinions in, but that this can be challenging/sway the direction and focus. But, if you don't do it there is a risk of getting stuck and not evolving.

Timelines:

- There was a general view that you go through the same decisions/motions each year. Festivals are cyclical. So, after 5 years it's easy to make most decisions as you've made them many times before.

Review/formalising/operational and strategic:

- Some talked about the difference between operational decisions being taken consistently by one individual without discussion and then how difficult more strategic decisions feel when others need to be involved and the answer is not clear.

For instance: One group face a BIG decision about whether to formalise/to what extent to formalise. Realises they cannot make this decision on their own and is considering a strategic review to ensure others are involved in making the plan/decision together. Asked for suggestions of people to approach. Some offered.

Question 2 – Who takes over?

If you/your festival 'leader' walked out of the door tomorrow, how ready are you? 5 being very, everything is in place – easy. 1 being not at all.

- In answer this question, the group had about two 5s, a 4, some 3s and a couple of 2s and a 1.

In answer to the 'What **one step** or action can you take as a result of today/what you've reflected on?

- Remind oneself to take the time that is needed, not rush.
- Allow others to step in, help and support.
- Give oneself permission to not feel guilty about asking others for help/support.
- De-personalise the process. It doesn't need to be personal or overly emotional.
- Remind everyone, often, that they're valued and we are grateful for all they do.
- Trust the other people who are involved.
- Keep values and the value of our work at the centre of our decision making/process/change.
- Believe / know it is okay to pass it on, to hand it over and that it will be okay.
- Trust that instinct, accident and fortune play an essential part of the process. Design the process to allow for these and the flexibility your organisation needs. Don't have a rigid structure/approach if you know it's not going to work.
- Ensure people feel acknowledged, thanked and have a lovely farewell.

General observations/feedback

The group were on the whole aware of the need for change and actively working to prepare for it in many different ways.

It was quite a diverse group, with some feeling that they had everything in hand, all was planned, orderly and their 'leader'/key people could leave tomorrow and all would be well. Others felt somewhat less confident and certain about how to manage the process, how to move from where they are to where they need/want to be and a number aren't sure where they are aiming for. Across the group there was a real acceptance of operational level change and that festivals need to do this all the time – especially over the past two years due to Covid. However, they felt less certain/confident about strategic change or changes in direction / the founder moving on etc etc.

Key take away points –

- A need to support individual festivals to better understand what changes are really needed / wanted for them and WHY
 - Specific to them, their audiences, their participants/partnerships etc.
 - Perhaps some feel they should change but haven't interrogated why and maybe

they don't need to, yet?

- Surgeries to look at timing, and pacing of change and the preparedness to stop what you've started if it's not going where it need to, how do you know if you're on track? What if you reach a junction and take the wrong turn? etc.
- All are aware of the importance of handling change well, but lack confidence/experience of how to do this at pace, at scale, in a non-harmful, open and transparent way.
 - Could some change models be shared and some simple tools they can personalise, work through and adapt?
- The 'one change' comments focus on the need to build trust, acknowledge contributions, support individuals, develop good relationships etc.
 - for some groups protecting feelings would be perceived to be paramount as opposed to helping people get comfortable with the uncomfortable/recognising the need for change and understanding the change curve from an emotional and professional perspective – which takes us back to the WHY.
- This group had an instance of a directors actively seeking a replacement and struggling to find the right fit. This is unsurprising as this is a common challenge across recruitment as a whole, to boards but particularly for leaders/change makers.
 - Perhaps a focus on how to ensure positive recruitment experience and the opportunities/challenges of NOT appointing a carbon copy of the previous / current leader?
- Some have a very good handle on processes and shared intelligence etc and could be used as examples of how to plan and build processes for change/ stability / security etc.
 - Can they share what they do and how they do it and why they made themselves do it? (le have they always done it or did they face a crisis and learn from it? How has it helped them? Where do you start if you've nothing in place? Etc.)

However, what happens if you scratch beneath the surface of those who have all the paper plans in place? **Are things as good in action as they are on paper?** How can festivals be supported to test that for themselves and where's the next opportunity for them to learn from each other?

Reflection 2: Breakout Group 2, facilitation and notes by Tony Reekie

From a general discussion with the breakout group the following themes emerged

- History and ghosts. How do you deal with the present and past when things have to change?
- How do you organise for change and succession? This felt 'daunting and intimidating'.
- 'We've always done it this way!' How do you effect necessary change when there is pushback and a desire to keep things the way they are?
- How do you involve more people? How can you make the change process a more collective experience? This point was countered by those who have problems with decisions made historically by committee and the need to change through the allocation of decision-making powers to a smaller number of people.
- Where does the audience fit into change? Do they want to see things change?

Overall the need for support, mentoring and sharing came through strongly.

- How do festivals learn from each other when going through change?
- How do they not repeat the same mistakes or how do they share and learn from mistakes/issues that arise from any change process?
- How do we look after people through a change process, knowing that some people may or will not be part of the longer-term journey of the festival?

Reflection 3: Breakout Group 3, facilitation and notes by Jon Price

Question 1 'Who decides' / 'How long is too long'

Responding to this question the group focused quite quickly on the issues around getting new people to participate in decision making.

- One referenced the “difficulty of bringing people on board”, and another complained that newer volunteers “don’t have the skill set”. One mentioned being “the person with the passion”, suggesting a lack of trust that the same level of commitment was really brought by others. At the same time, a participant observed the “instant burn-out” of committee members in their organisation as the pressure to do everything devolved to a tiny core of people. Someone proposed that “No is a good word to have in your vocabulary” but others were sceptical that things would happen if they said no to doing them.
- An obvious correlation emerged between struggling to involve new blood and issues of burn-out.
- One participant referenced experiences of building up trust with volunteers by giving them full responsibility for doing smaller elements of work, and in particular getting young people to take greater levels of responsibility for individual events, and therefore growing the capacity for others to take over.
- In relation to the question of ‘how long is too long’, someone mentioned being the person who wanted to push things forward and create change in their organisation, but being resisted by committees wanting things to stay the same.

Question 2 – “Who takes over and how can change happen well?”

- Some of the discussion in response to this question was around how to define “well”. One person described this in terms of the relationships – being able to preserve links and goodwill while passing over responsibilities (i.e. the personal side). Others thought it was much more about ensuring that things continued to run well (i.e. the organisational and practical side): “proper structures, bank accounts, phone books”.
- One participant described the experience of leaving a festival, having prepared quite well for doing so, but still expecting the phone to ring or to be invited for cups of coffee afterwards – and then being surprised when that didn’t happen. Ultimately, they realised this clean break was positive: “I left. I’m gone. It’s good, things will change”. There was some consensus around the need for a clean break when moving on; another experience quoted was around staying on as a committee member but not as a leader, and ending up feeling very constrained about what they could say, ultimately finding themselves useless and better off stepping away.

- In response to the question of when should change be discussed, one answer was that this should be ongoing, facing the issue that corporate memory can disappear. There was some agreement eventually that we shouldn't be always discussing change, but neither should it never be discussed. Somewhere in the annual cycle, perhaps, there should be a point when it is addressed.

Question 3 - Who should you hand over to?

- There was consensus around the idea that the reason for the festival being there needs to be felt strongly and refreshed. Volunteers who share the vision and mission are important; the word "passion" came up again. Volunteers were seen as bringing this in a way that paid staff, brought in to do particular roles, never can. Change happening "well", it was further reflected, was someone like this ultimately taking over.
- Another view was that governance is really important and handing over to a strong committee is crucial. We had some further discussion around this and the idea that you need a coalition for change, where the ownership of the process is shared and the need for it is more broadly understood and accepted. One thing that became clear from the discussion is that when founders, or other highly experienced organisers reach the time to leave, they have inevitably unique combinations of knowledge and experience that could never be replaced by one new person – and yet most organisations seek to do just that, find the individual moulded in an impossible shape, hence the anxiety about letting someone move on.

Although the discussion didn't get as far as this, but there is an implication of new structures being needed, not just a replacement individual, when a particularly crucial individual moves on]

- We had some discussion around the experience of Covid and the enforced break it represented. There was some feeling that this had been positive in some ways, particularly in renewing passion and commitment – which is part of what gets burnt out when the annual cycle is never interrupted. One person spoke of feeling like their event now had permission to think about happening every other year so as to preserve its urgency.
- Another suggestion was that if it gets to the stage that you want something really different and are at odds with your organisation in terms of making that happen, then it might be time to strike out on your own and start a new event. Embody the spirit that began the festival you've been working for in the first place.

The overriding sense coming from this session was that handing over to others successfully is not a simple stepping away from care and responsibility, but an active process requiring generosity and trust. Probably the three most significant recurring words across the two conversations were

trust, passion and **burn out**. Further interrogation of the relationship between these three themes is needed for both individuals and committees working in a festival context.