

## FLEXIBLE FUNDING ASSESSMENT

<b>Applicant name:</b>	Pitlochry Festival Theatre	
<b>Application Reference number:</b>	G201001004	
<b>Amount Requested (Year 1/Year 2)</b>	£348,289	£408,355
<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>		
<p><b>Comments:</b>  The application is from the Pitlochry Festival Theatre (PFT), located in Pitlochry, Perth and Kinross. Their primary purpose is to deliver a programme of summer theatre repertoire, a winter season incorporating drama and other artforms, and the delivery of related learning activities.</p> <p>They are currently Flexibly Funded by SAC. SAC also provided transitional funding support to clear accumulated debts. They are also revenue funded by Perth and Kinross Council.</p> <p>Their aims and objectives are clear: to increase audience numbers and the diversity of that audience; to improve the quality of the experience they deliver; and the economic stability and long term sustainability of the organisation. Their achievements since April 2005 are clear and well evidenced. The introduction of new reporting and budgeting systems has allowed greater analysis of PFT's underlying financial position, allowing a clear business strategy to be developed, showing a realistic plan of growth development and innovation.</p> <p>A detailed and comprehensive programme/revised operational model has been provided for all of their activities for 2009/11 <i>'the approach to planning is thorough and thought-through'</i> DT. It is clear that the proposed programme is concerned with the significant development of their work. It clearly addresses all of the criteria to a degree. Of particular note is: it's potential to improve engagement with the public; the overall potential in attracting audiences to the work/venue; their location in an area of otherwise limited provision; their commitment to education and their in their role in supporting artists is also noted.</p> <p>Their previous track record is good and they have proved their ability to consistently deliver a programme of quality. There is no reason to doubt their commitment or ability to continue to do this in the future. DT is clear as to the improvements in quality, range and scale of what is likely to be delivered, while recognising the significant increase in the level of request from SAC, and the limited increase in support from the LA.</p> <p>In terms of the programme, quality of activity, and artistic leadership likely to be delivered, the application is considered a <b>High</b> priority for support. In all other respects i.e. business plan and financial matters it is considered a <b>Medium</b> priority.</p>		
<b>Officer's overall priority recommendation</b>		<b>MEDIUM</b>
Lead Officer signature:		Date: 24 January 2008
Print name:	Sandy Blair	Revised: 20 March 2008

## 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?

### Comments:

Attendees:

David Taylor, Co-Director of Arts

Specialist Advisors: Stewart Ennis, Tim Licata, David Leddy, Alex Patience, Sandy Maxwell, Stephen Slater, Stephen Stenning and Laura Tyrrell

The Panel identified the following strengths and weaknesses of: Pitlochry Festival Theatre

The SAs thought that the application did not convey a sense of the quality of the programme proposed nor did it communicate a compelling artistic vision. The plans contained in the application were considered unadventurous.

There was no clear purpose of what they are going to do; the application referred to a lack of musical theatre in Scotland but this was not fully followed through adequately in the proposed programme.

The main programme elements were felt to be not dissimilar to the existing artistic programme.

It was accepted that if the company wished to widen its audience appeal then it needed to change and that time would be needed for the transition.

Specialist Advisors overall rating: 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:

Pitlochry Festival Theatre's (PFT) primary purpose is to deliver a programme of summer theatre repertoire, a winter season incorporating drama and other artforms, and the delivery of related learning activities. Currently it produces 6 plays in repertoire. The key proposal is to increase this to 8 by 2010/11 in order to provide "more challenging programme selections and more adventurous production realisations."

Their stated aims are to:

provide arts experiences of the highest quality for all potential audiences and participants.  
attract a wide range of audiences, participants and visitors from across Scotland and beyond.  
achieve long-term economic stability and become a key player in Scotland's arts economy.  
ensure that PFT is an international benchmark for creation and delivery of 21<sup>st</sup> century arts.

#### 1. *Fit with FXO criteria:*

*1.1 Excellent artistic vision and leadership; role within sector/support to artists* The artistic vision is considered to be good (according to evaluations) and the organisation has a rigorous process for evaluation and reflection on artistic outcomes. The organisation provides opportunities for directors and other artists through employment opportunities. There are limited opportunities for developing their work beyond the bounds of the repertoire system.

### *1.2 Improving your engagement with the public*

The applicant proposes a range of education and outreach activities. The key outcome of the proposed changes to the repertoire model is to increase audience numbers and also widen the range of offer and hence the range of people who attend.

### *1.3 Good practice in the governance and management*

The organisation has experienced and capable management. Past issues that were related to over commitment on capital projects appear to have been addressed. The Board is diligent in overseeing the finances.

### *1.4 Practical implementation of your equal opportunities policy; widening access*

Good access for those with physical disabilities. Provisions for supporting disabled attenders are good. The application indicates that there is a through casting policy that results in actors playing against the character's racial type.

### *1.5 Raising other income at least 25% Met.*

Met.

### *2. Fit with Departmental priorities*

No particular fit with Drama priorities.

### *3. Fit within Scottish Arts Council aims*

PFT's main strategic importance lies in the large audiences it attracts, particularly relative to the level of SAC support that it currently receives- this meets the aim of increasing participation very well. Enabling artist to fulfil their potential is met but not highly. Putting arts at the heart of learning is met in part.

**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**

### *1.1 Application rating*

The Assessing Officer rates the application as medium, and the Specialist Advisors as low. The artistic programme is of consistent quality with the majority of evaluations being in the category of 'good'. The officer's assessment recognises this and the Specialist Advisors' comments indicate that the quality is considered to be acceptable but not exemplary.

### *1.2 Reasons for assessing at this rating*

I rate the application as medium as the evaluations that we have commissioned indicate a 'good' outcome in relation to quality and the organisation appears to have re-established sound financial management after a period where large deficits were generated and then acted as a brake on the company's development. The applicant's proposal to move to a more expensive production model is likely to lead, in my view, neither to a significantly improved artistic offer nor to a proportionate growth in attendance levels.

I therefore rate the application as a medium priority.

### *1.3 Strengths of application*

A rational approach to audience development that is based on changes to programming structure. That is to say the proposals would allow a finessing of the offer in order to serve a wider audience, or audiences, than currently. In my view the key strength lies in the numbers of attendances that are accessed currently and that are likely to continue, even within the current repertoire model.

*1.4 Weaknesses of applications*

I have some doubts that the revised repertoire structure and consequent variation of the repertoire would in itself significantly increase or diversify the audiences attracted to the theatre. I believe that a significant market re-positioning would be required to achieve this and there is not significant evidence that this would take place.

*1.5 Specific risks associated with the application*

That audience levels would not increase as predicted. That the Board loses sight of the imperative to manage commitment within known resources.

*1.6 Development areas identified*

Development of an access and inclusion policy.

*1.7 Recommended level of support*

**£310,000 pa for two years.**

**4.** Please comment on the geographic reach of the programme

**Comments:**

The applicant draws the majority of its audience from outside its immediate catchment area with significant numbers coming from Glasgow and Edinburgh. This reflects its role as a tourist destination and establishes it as having greater impact than a merely local facility.

**Head of Department's overall priority recommendation**

**MEDIUM**

Head of Department's signature:

Print name:

David Taylor

Date: 15 Feb 2008

Revised: 25 March 2008

<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.		
<b>Directors recommendations to Joint Board</b>		<b>Low Medium</b>
Acting Chief Executive signature:	Jim Tough	Date: 10 April 2008

<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:</b> The Joint Board accepts the Stage 4 recommendation.		
<b>Joint Board Final Decision</b>		<b>REFUSE</b>
Date: 24 April 2008	If approved for support, enter sum awarded	

**End of Assessment**