

## FLEXIBLE FUNDING ASSESSMENT

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| <b>Applicant name:</b>                  | Byre Theatre of St Andrews |           |
| <b>Application Reference number:</b>    | G201001073                 |           |
| <b>Amount Requested (Year 1/Year 2)</b> | ££190,600                  | ££196,000 |

### Officer's recommendation

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

*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*

#### **Comments:**

Established in 1969, the Byre Theatre (BT) is a company limited by guarantee and a recognised charity which has been in receipt of Scottish Arts Council revenue and project funding for many years, at least since 1994. The company has recently completed a major restructuring following the Scottish Arts Council decision through our strategic review to reduce its level of core funding.

The Byre clearly fulfils an important role for the local community and increasingly for the wider area. The programme it currently provides is diverse and this too is becoming more varied, offering something for a range of audiences. The company is at a critical stage of development following its revisioning and repositioning exercise, informed by research undertaken by Bonnar Keenlyside, and with the support of the Board, the new Chief Executive is attempting to put in place a visionary, ambitious and engaging programme of work for the future.

The concern for this assessor is that BT is attempting too much, too soon and that there is a lack of evidence throughout the application to have confidence in the practical realisation of these ambitious plans. The density of information in the Business Plan, combined with a perceived lack of coherence and timetable for activity, makes it a challenge to clearly distinguish current activity from new activity. It is also hard to ascertain, in some of the proposals, how much development work is required and what this comprises.

In the conclusion to the Business Plan, the applicant makes the following statement:

*"This plan takes a phased approach, delivering a sustainable core operation which has the flexibility to respond to the development of some key artistic and educational ideas which are in development. The plan for 2008-2011 maps out a significant journey of repositioning."*

In assessing the application, this stated intention to a phased approach was not perceived to be well communicated through the material submitted. A clear timetable would have greatly aided assessment, as would a clear separation of the core operation referred above, as distinct to development of the ideas.

**Key strengths** are summarised as:

- Important critical success factors since 2005 including new partnerships with the National Theatre of Scotland, Edinburgh International Festival and co-producers of three TMA award-winning shows
- Status of Scotland's only 5 star accredited arts venue through Scottish Tourist Board
- Visionary elements of proposed programme, particularly the Apprentice Company
- Level of potential public engagement through proposed education and outreach work and

diversified programme

- Particularly strong partnership and collaboration
- Current support for artists and good track record

**Key weaknesses** are summarised as:

- No Equal Opportunities Policy submitted leading to difficulties in assessment
- Overly ambitious programme proposed given developmental stage of repositioned organisation
- Lack of clarity over status of partnership funding from Fife Council
- Lack of detail regarding governance in particular relating to financial reporting procedures
- Dependence on other funding, especially SAC project funds, to deliver proposed programme
- Lack of a clear timetable and overall coherence of the Business Plan
- Lack of baseline data relating to targets and relationship of targets to activity
- Apparent inconsistencies of information eg between Business Plan and Marketing Plan
- Concern over practical realisation of programme

Risk relates to the practical realisation of the proposed programme of work as highlighted throughout this report. However, in the decision to award flexible funding, it is perhaps most significant that the organisation is at an early stage of repositioning itself. The increase in current funding levels is aimed at supporting development of the new 'cultural hub' business model. If flexible funding is awarded, the organisation could be advised to scale-down its developmental aspirations for the artistic and educational programme in the period 2009-11; and to focus instead on developing clear strategies to deliver against the new business model.

**Officer's overall priority recommendation**

**MEDIUM**

Lead Officer signature:

Print name:

Gwen McLeod

Date: 30-Jan-08  
Revised: 20.3.08

## 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 Byre Theatre:

From their experience the SAs judged that The Byre is a first class facility and a user-friendly building for producers and audience alike.

The application was very difficult to read, containing some factual inaccuracies in relation to proposed partnerships with other theatre companies – that is proposed collaborations that were not reflected in the applications of the supposed partners or direct knowledge of the SAs, (Catherine Wheels, STTC). Claims regarding co-production proposals appeared exaggerated, and should in some cases (e.g. NTS) be more accurately styled co-presentations.

The aspiration to act as a 'creative hub' was welcome but let down in the presentation of the application. SAs felt that the business side of the application was given prominence by the applicant rather than the artistic side.

The suggested site specific activity was interesting, but not enough detail was provided.

The application details a high level of collaboration with artists, and the applicant's aspirations as a creative hub. It is recognised as a valuable resource as a venue; touring companies want to go to the Byre. Their *willingness* to work collaboratively is very strong. There are exciting suggestions detailed in the application, but they would benefit from further development.

There was some concern that the proposals were over-ambitious. Nevertheless a more moderate level of activity would be appropriate and more certain to be delivered.

The Specialist Advisors rated this application overall as: High

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:

The Byre is a high quality facility and has enjoyed a good reputation for its ability to provide production support to companies in the past. The value of investment in the Byre is not limited to the benefits directly experienced by local audiences, but is also beneficial to the general touring theatre and dance infrastructure through support and partnership with companies. The site specific activity is interesting and if funded, the applicant should be expected to deliver on this.

*1. Fit with FXO criteria:*

*1.1 Excellent artistic vision and leadership; role within sector/support to artists*

The application demonstrates a commitment to supporting artists through co-productions. The Specialist Advisors identified that the venue is regarded as important to theatre companies and is supportive to artists. Therefore it has a role in helping artists to realise their potential. There is also a commitment to increasing participation with 60-70,000 participants per year projected.

*1.2 Improving your engagement with the public*

The Assessing Officer rates the public engagement as high and the Specialist Advisors noted that the venue is popular with the public.

*1.3 Good practice in the governance and management*

The Assessing Officer has raised concerns about the organisation's capacity to deliver what the proposal promises. The overall governance model is appropriate but I have some doubts about whether effective delivery of the programme can be guaranteed.

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

There are clear plans to widen engagement with the public including specific strategies to open up to various sub-sets of the local population.

*1.5 Raising other income at least 25%*

Met.

*2. Fit with Departmental priorities*

The programme includes a good range of work for children and there are plans for some street theatre events. The first is well met, the latter partially so.

*Fit within Scottish Arts Council aims*

Support to artists comes in the form of co-production and offering space time and support for developing work. The levels of participation- as audience members and active participants are high and therefore this is well met. Lastly there is a good programme of education and outreach described.

**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*

*a. comparison with Officer and Specialist advisor comments and recommendations*

I rate this application as medium as the proposals meet all three SAC aims and also the departmental priorities (though the outdoor performance aspect is not a major aspect of the plans). The Specialist Advisors rated the application as high.

*1.2 Reasons for assessing at this rating*

The assessing officer rated it as medium in light of concerns about delivery, and I share these concerns.

*1.3 Strengths of application*

The strengths are that the plans are comprehensive and promise to deliver well in the areas of

engagement and support to artists. I believe that the overall vision and direction of the organisation is appropriate.

#### *1.4 Weaknesses of applications*

Weaknesses relate to the presentation of the application which raises doubts about the organisation's ability to deliver. The approach to programming that is proposed is interesting and appropriate, but lacks detail at this stage. The assessing officer and the SAs have both commented on the lack of clarity in the application and this resonates with my direct experience of some communication from the applicant, and reflects some apparent lack of administrative effectiveness in the organisation.

#### *1.5 Specific risks associated with the application*

The main risk relates to the ability to deliver what is promised. I agree that there is a danger of over-promising and under-delivering in the plan which could also result in financial difficulties if too much activity is attempted with inadequate financial and human resources.

#### *1.6 Development areas identified*

The need to re-appraise the feasibility of delivering against all of the proposals.

#### *1.7 Recommended level of support*

I recommend support for the organisation, but which would be conditional on a review of financial and administrative resource and procedures. I recommend that the organisation is funded at a level, to be determined, that is higher than the current flexible funding level in order to strengthen the management and financial functions.

In recognition of the need for enhanced managerial capacity I recommend an increase on the 2008/09 level of funding of £20,000 and in addition allowing some increase with respect to inflation, thus making the recommended level £176,000 per annum.

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

##### **Comments:**

The applicant states that the geographical impact is limited to Fife. Fife is a populous area. There are other providers of performing arts in the local authority area, but they do not provide the same level of collaboration with national arts organisations.

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

**MEDIUM**

Head of Department's signature:

Print name:

David Taylor

Date: 25 March 2008

Revised: 26 March 2008

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|---|------------|--------------------|
| <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><br>Recognise that the Byre is at a particular stage of its recovery plan but it must demonstrate progress in 2008/09 in addressing the development issues identified, to the satisfaction of the Scottish Arts Council, before FXO funding in 2009/10 should be released.<br>Suggested level of support: £160,000. |            |                    |
| <b>Collective Heads of Department (Arts Development Managers) priority recommendation</b>   |            | Strong 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><br>Agree with Stage 3 recommendation and comments. Condition of grant that Directors should be satisfied with progress on recovery plan over six months to end October 2008.<br>Suggested level of support: £160,000. |           |                     |
| <b>Directors recommendations to Joint Board</b>  |           | Strong medium       |
| Acting Chief Executive signature:  |           | Date: 10 April 2008 |
| Print name:  | Jim Tough |                     |

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| <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><br>The Joint Board accepts the Stage 4 recommendation.  |  |                   |
| <b>Joint Board Final Decision</b>  |  | <b>APPROVE</b>    |
| Date: 24 April 2008  | If approved for support, enter sum awarded | £160,000 annually |

**End of Assessment**