

## FLEXIBLE FUNDING ASSESSMENT

<b>Applicant name:</b>	Plan B Collaborative Theatre	
<b>Application Reference number:</b>	G201001020	
<b>Amount Requested (Year 1/Year 2)</b>	£91,700	£164,500
<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>  <b>plan B</b> was formed in 1989 by Frank McConnell to explore new ways of creating and presenting dance and theatre in performance. The company has always been committed to a bold and imaginative style which is innovative in its devising and accessible in its delivery. To date the company has produced six presentations, most of which have been created in isolated rural communities, and some of which have toured nationally.</p> <p>Plan B secured Flexible funding of £80k per year in 2007. This was to create one tour over the two year period as well as developing new works. The organisation is requesting a 31% funding increase for 2009/10 and a further 79% increase for 2010/11, which reflects the increased activity and subsequent increase in production and touring costs proposed for this time.</p> <p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• Artistic director respected nationally and internationally as a choreographer and artistic leader</li> <li>• Good management structure</li> <li>• Strong collaborative partnerships with high quality artists proposed</li> <li>• Meets all the criteria listed for this fund</li> <li>• Meets Dance Department priority for development of choreographic practice, production and touring on several levels – creating work and supporting creative development of choreographers</li> <li>• Clear visionary business plan</li> <li>• Good programme of work proposed</li> </ul> <p>2 eligible artistic evaluations with 50% competent, 25% good, 25% excellent (split rating)</p> <p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>• Financial reserves of the company are weak</li> <li>• Medium financial risk, medium value for money</li> <li>• No contingency if funds from Scottish Arts Council not achieved or at lower level than requested</li> <li>• Marketing plans need SMART objectives</li> <li>• Management skills of the company need developed, including fundraising experience</li> <li>• Staff pay scales and appraisals to be worked up</li> </ul> <p><b>Fit with Flexible funding criteria:</b>            1 Excellent artistic vision and leadership; role within sector/support to artists – met            The programme of work proposed is comprehensive, and artistically exciting. The proposed programme also offers mentorship to other choreographers.</p>		

2 Improving your engagement with the public – met  
Clearly evidence within the business plan.

3 Good practice in the governance and management – met but with some development required  
Plan B has a strong and supportive Board that monitors its success. Some processes are not clearly articulated within the application and might need developed such as staff appraisal.

4 Practical implementation of your equal opportunities policy; widening access - met  
Clearly articulated in the application.

5 Raising other income at least 25% - met

**Dance priorities** - development of choreographic practice, production and touring - met  
This is evidenced through the proposed programme.

The work proposed by plan B is appealing and would potentially reach a wider audience than estimated. I would therefore rate this application as a high priority for support. However, because of the few development areas identified above, and the definition for the priority ratings, I rate this application Medium.

<b>Officer's overall priority recommendation</b>		<b>MEDIUM</b>
Lead Officer signature:		Date: 30/11/07 Revised: 20 March 2008
Print name:	Susan Hay	

## 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:

The panel of dance specialist advisors who considered this application included Dawn Hartley, Ian Spink, Lucy Mason and David Williams. The panel commented:

**Plan B's** application and business plan demonstrate a breadth of work and strong mix of projects across professional and community work. While appreciating the ambition in the plan, there was some concern that such an extensive programme may stretch the company artistically. The panel recognised that Plan B is particularly strong in community/ educational work and appreciated the artistic focus that influences all aspects of the company's work. They were, however, disappointed that more information was not provided on the other choreographers to be involved in the creative practice projects. From their experience of previous Plan B productions, the panel noted that there had sometimes been disappointment in the choreography.

The panel rated the application as medium priority for support.

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:**

Plan B is one of the new dance organisations which received flexible funding for 2 years from April 2007.

*1. Fit with FXO criteria:*

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

Plan B strongly meets the FXO criteria of 'artistic excellence' and, led by choreographer Frank McConnell, demonstrates strong artistic leadership. The company is based in the Highlands and the business plan strongly articulates the leadership and influencing role they aspire to play in this geographic area which currently has limited dance provision. The company strives for the same artistic standards in all aspects of its work and collaborative practice with high quality artists from other disciplines is a core influence on the work.

*1.2 Improving your engagement with the public*

Plan B demonstrates a commitment to 'public engagement' through an innovative and broad programme of professional production and community/ education work.

*1.3 Good practice in the governance and management*

Plan B is a limited company with charitable status and has been working with the Scottish Arts Council's Quality Framework and is used to striving to continuously improve its practice.

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

Plan B has an Equal Opportunities policy in place and has given consideration to implementation across all areas of its practice.

*1.5 Raising other income at least 25%*

Plan B has met the matched funding requirement.

*2. Fit with Departmental priorities*

Plan B strongly meets the dance department's priority of 'the development of choreographic practice, production and touring'.

*3. Fit within Scottish Arts Council aims*

Plan B's vision and proposed plan of work contributes significantly across all three of the Scottish Arts Councils Aims: 'to support artists to fulfil their artistic and business potential' and 'to increase participation in the arts' and 'to place creativity at the heart of learning.'

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*

I concur with the Assessing Officer in rating highly the artistic leadership of the company, but recognising a small number of development areas must rate it overall as medium priority for support. The assessing officer recognises the quality of the artistic leadership provided through Plan B and the imaginative and wide-ranging programme of work proposed. The Specialist Advisors raised concern that this programme might over stretch the company and expressed some queries of the consistent quality of the company's choreography. However, I believe that Plan B's plans for

2008/09 provide a strong springboard to achieving this programme and include a commitment to choreographic research and development which will feed into the proposed future programme.

*1.2 Reasons for assessing at this rating*

This rating recognises the development areas identified.

*1.3 Strengths of application*

- meets the criteria for Flexible funding and the priority established by the dance department.
- strong artistic leadership from established choreographer
- proposed programme includes collaborative partnerships with high quality artists
- clear visionary business plan with management structure in place to deliver

*1.4 Weaknesses of applications*

- marketing plans requires development
- management skills of the company need developed, including fundraising experience

*1.5 Specific risks associated with the application*

Nothing specific to note.

*1.6 Development areas identified*

The company is still at an early stage of development and would benefit from strengthening its organisational structure and approach to audience development.

*1.7 Recommended level of support*

The level of support applied for is appropriate to the programme at £91,700k in 2009/10 and £164,500 in 2010/11. It should be noted that the significantly larger request in 2010/11 relates directly to a co-production with the band Shooglenifty and the costs that would be involved in the creation and touring of this work with a live band. Given the demands on flexible funding, I recommend support at the level of £110k per year.

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

**Comments:**

*1.1 Where will the activity/programme take place?*

Plan B is based in the Highlands and the application states that all the company's activity will take place in this area. However, in the full artistic plans contained in the business plan there are details of one professional touring production annually which will tour throughout Scotland.

*1.2 Where will the audience come from?*

From the Highlands and areas to which the company tours.

<b>Head of Department's overall priority recommendation</b>		<b>MEDIUM</b>
Head of Department's signature:		Date:12 February 2008 Revised: 26 March 2008
Print name:	Anita Clark	

<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> Good overall fit with FXO criteria. The amount reflects development areas identified, the competitive funding context and assessment recommendation. Suggested level of support: £110,000 annually.		
<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> Agree with Stage 3 recommendation. Suggested level of support: £110,000 annually.		
<b>Directors recommendations to Joint Board</b>		Strong 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:</b> 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	£110,000 annually

**End of Assessment**