

**PITLOCHRY FESTIVAL SOCIETY LIMITED  
A REVIEW OF ARTISTIC POLICY**

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and the Pitlochry Festival Theatre  
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## **1. PITLOCHRY FESTIVAL THEATRE**

### ***1.1 Background to the 'Theatre in the Hills'***

Pitlochry Festival Theatre grew from the Park Theatre, Glasgow. This was established by John Stewart, a business person, in 1941 and closed in 1949, when the company took the first steps to building a professional festival theatre that he and Kenneth Ireland founded in 1951. The first theatre was a large tent; this was replaced by a more solid construction, and in this incarnation, the Festival Theatre sat 502. A new, permanent bespoke theatre opened in 1981, one mile west of the town centre, at Port-na-Craig. (544 seats).

There is a seasonally permanent acting company (2002: 17 actors) and the policy is to perform in repertoire. Throughout the summer season (from May to October) the Festival Theatre shows five plays in one week (hitherto six plays): Pitlochry is a very small town of 2,572 residents,<sup>1</sup> and until now the purpose of the Theatre has been the premier tourist attraction in an awe-inspiring and breathtaking popular Highland resort, with walking, shooting, whisky-distilling, eating, castles and salmon-fishing on the River Tummel amongst the visitor attractions.

This catering for tourists conditions not only the unique form of the repertoire – the slogan has been ‘to stay six days and see six plays’ – but also the choice of plays. For many years until 1983 (when Festival Director Kenneth Ireland and a succession of Directors of Productions and Administrators creatively and managerially led the Theatre), the Theatre chose its programme along this pattern of drama: a low-lowbrow, a high-lowbrow, a low-middlebrow, a high-middlebrow, a low-highbrow and a high-highbrow. Seasons were a discriminating mix of prudence and enterprise. Then, after three changeable and financially unsuccessful years under artistic director Sue Wilson to 1986 (a year when 44,000 tickets or 49 per cent of capacity were sold) – Festival Director Clive Perry’s first full season in 1987 led to a second era of long-term stability and achievement. Thereafter, annual play lists might be said to contain one annual ‘prestige’ choice and five middle-ground plays. Throughout the Theatre’s history, Scottish drama has been staged, notably revivals of classic plays by J.M. Barrie, James Bridie, et al. Additionally, Sunday concerts are presented.

In Perry’s first year, 50,000 tickets were sold; they increased steadily and in an exceptionally good season, 70,000 theatregoers (70 per cent of capacity) have been welcomed for the in-house productions. These statistics illustrate the gamble, which has – and always will – condition the programme. These theatregoers (for some of whom a visit represents a long-term annual pilgrimage) are estimated to contribute £4,000,000 in economic benefit to Pitlochry; the Festival Theatre is the biggest business in the area and has established itself as a theatrical Mecca. The ticket prices range from £15 to £20 with concessions; there is an excellent restaurant managed in-house, but few other services that many city theatres provide – no education and outreach programme, and no studio theatre. There are good production workshops, rehearsal room and dressing rooms; the Theatre was substantially refurbished in 2000, with front-of-house extended and now heated in the foyer, it now offers the potential to extend the programme into the winter and spring. There is a new Garden

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<sup>1</sup> <http://www.pkc.gov.uk/aboutpk/factsfigures.pdf>

attraction. Unlike most non-profit theatres, where the local authority owns the freehold, the non-profit charitable company owns Pitlochry Festival Theatre. A new Garden, the Scottish Plant Collectors' Garden, is nearing completion, on land leased from Scottish Hydro-Electric; this includes an amphitheatre and offers potential for open-air performances.

The Theatre's budgeted costs in 2002 are approximately £1,639,000. Earned income is expected to be £1,223,000. Revenue grants in 2002 total £457,000 (Scottish Arts Council £280,120 main and £17,500 other; Perth and Kinross Council revenue £159,556). At 80 per cent of income earned from box office and ancillary activity, this is by a large measure the most self-sufficient Scottish producing theatre; the company has proved its worth in a highly competitive environment and, in most years, its reputation has been secure, with its artistic and administrative imperatives in balance.

Even so, Pitlochry Festival Theatre works flat-out for seven months of the year with full utilisation of resources; it operates 'on the edge'. Despite the many years of trusting and supportive assistance from the funding bodies, the margin for error is slight; there are few built-in audiences at Pitlochry and (like all true festival theatres) it has positively to attract tourists, by means of the short-breaks market, day-trippers in coach parties or unseasoned theatregoers on holiday in the vicinity.

## *1.2 Summary of this paper's observations*

1. The artistic value of Pitlochry Festival Theatre is often underrated: its future vision lies in the continuation and development of the 'festival' *ethos*: the fantastic geographical location, new ideas for the forward-looking interpretation of old plays and occasional new drama but, foremost, the defining feature of the resident acting ensemble.
2. The Festival Theatre's history gives it a special position in Scottish theatre: an uplifting and idyllic setting where the art of the theatre and nature are integrated through a 'festival' *environment*. This offers the public and artists a dimension for the intellect, for words, ideas and reflection as well as for razzamatazz. The feature of established well-made plays should be positioned alongside ambitious production.
3. Some people in the arts establishment believe that Pitlochry Festival Theatre is out of touch with metropolitan habits and contemporary drama, that it is inclined to be cautious because it entertains a senior audience who are supposedly resistant to 'challenging' plays. The reality is that Pitlochry cannot radically lower the average age of the audience because there is no urban population.
4. All negative connotations can be reversed and turned again to positive advantage. Underlying them is the need for the company to reaffirm the stronger, redeeming attributes: the excellent stage and the refurbished buildings, the origins of the theatre and the continuity of tradition, the employment of 17-plus

actors performing in nightly repertoire, the first-rate craft skills in design, stage management, production and workshops. Free from vanity, the company has been self-effacing in spreading the word. It talent-spots well; senior theatre-makers work alongside young actors for mutual benefit.

5. The need to maintain annual sales of 60-70,000 for the festival season, alongside the fear of alienating the senior audience, will always produce a heightened sense of caution in play selection. However, with societal changes, middle-aged theatregoers may well be the next 'in thing'.
6. Through stand-by pricing, better discounts and an education policy it can attract some younger theatregoers; a backpacker-market is in the town but often ignores the Festival Theatre.
7. The key is *how* the plays are staged and by which directors - and how the anticipation of excitement is conveyed to the public, the funding bodies and the media. The 'library' of play-choice is immense; the ambition and excitement can be increased, especially by having something new to say about supposedly 'middle-of-the-road texts' from the treasury of neglected 'boulevard' drama.
8. An interregnum management leads the Festival Theatre. Understandably, this, coupled with financial imperatives, has resulted in an irresolute leadership style. The precedence of artistic credibility is in danger of being second to day-to-day operations. The future artistic vision for plays, including new interpretations and veracious revivals will depend on the appointment of a respected, entrepreneurial new artistic leader. The leader should be intimately concerned with all strategic artistic, managerial and marketing aspects of the Festival Theatre, including the development and integration of the Garden. The confidence, knowledge and aspiration of a new leader would prove a strong attraction to new guest directors, the acting ensemble, the staffs and the stakeholders.
9. The employment of a new leader should be made this year. The Festival Theatre should recruit someone who is able to articulate a renewed, long-range vision, without reinventing the wheel. The post needs to be advertised as soon as possible and the board should reinforce this by using a search-consultant; because of the planning horizon, preparation for 2004 begins in December 2002.
10. There is presently no separable "education and outreach policy", but the Festival Theatre should devise a strategy, for activities organised by a designated full-time community or education officer, but this must be valued, by the support of a realistic budget. However, because the theatre operates flat-out for six months (plus rehearsals) any increase in output during the festival season will most likely require a corresponding hike in staff. Some infrastructure is available in the *off*-season; but this 'public service' is not a money-maker, even though the theatre might avail its facilities for community use and thereby further good relations with the town.
11. The company's main function is to be a cultivator of good theatre; this must not be downplayed. However, the company must follow government policy by developing a relationship to an existing "social inclusion partnership" at

Pitlochry or elsewhere in Perthshire; it might, for instance, work through the offices of the Theatre Chaplain, nearby special needs schools and other disadvantaged residents, to stimulate communication with them through workshops, expressive art classes and community activities, both outwith and within the building.

12. All questions of artistic and education policy are entangled with ill-conceived, complicated and untested objectives for cooperation or merger with Perth Theatre and, from 2004, a Perth Concert Hall. The relative artistic policies, seasonality, resident company ethos and location of the Festival Theatre are incompatible with combination, except in narrow circumstances.
13. For now, Pitlochry Festival Society's first duty is to itself; the Perth question should not delay the recruitment of a new artistic leader.
14. Opportunities for year-round programming and educational activities are secondary to maintaining and fortifying the summer season, but they are important.
15. A small number of *low*-financial risk visiting attractions – including amateur productions – can test the potential for programming outwith the summer.
16. Pitlochry Festival Theatre might contribute to the Scottish theatre firmament by being a shelter and mentor for production and rehearsal to an independent, small-scale touring company. Alternatively, during the off-season, it might be a public convenience to the Scottish national theatre; for its rehearsals and production weeks.
17. The Board of Governors might consider the appointment of a staff- elected member, and the co-option of a Governor from the wider theatre industry.

## 2. INTRODUCTION

### *2.1 The scope of this Paper: the "Advancement" Brief and Methodologies*

The brief for this component of assistance to Pitlochry Festival Theatre was to advise and comment on the overall artistic strategy (including education), in order to:

- With the board and staff, confirm/clarify the overall purpose of the theatre [and to produce a purpose statement].
- Consider the potential for repertoire development.
- Advise on development of a winter-spring programme including mini-festivals and other art forms.
- Consider the potential for Pitlochry Festival Theatre to be a resource for touring companies.
- Look at opportunities to involve amateurs.
- Advise on programming of events in the Garden.
- Consider opportunities for co-productions with other theatres and shared programming with Perth Theatre.
- Advise on the creation of an education programme for all ages including summer and winter schools, youth theatre and outreach.<sup>2</sup>

The purpose of this paper is to assist the Pitlochry Festival Theatre in the determination of the essential long-term artistic purposes and objectives and the allocation of resources for carrying them out. This review forms part of the company's "Advancement" programme for change management, to assist in framing a five-year business plan. It should be read in conjunction with simultaneous reviews of:

- Management and staffing structures and systems (Douglas Hall)
- New income generating activities (Max Gaunt, RGA et al)
- The development of a marketing plan (Jane Hogg, RGA)
- The development of a fund-raising strategy (Paul Iles)

The plan will be completed by the theatre's management team and Board of Governors by September 2002, with assistance from RGA under the direction of Max Gaunt, and then considered by the Scottish Arts Council before funds earmarked for Pitlochry can be confirmed.

After an initial RGA briefing with the Scottish Arts Council's advancement manager Miles Harrison and Pitlochry Festival Theatre's chief executive-and-executive producer Nikki Axford, I studied company documentation, interviewed David Taylor (head of drama at Scottish Arts Council) and discussed issues with theatre chairman David Pighills and theatre governor Gordon Hallewell. I have had several individual meetings with managers of the theatre, including festival director Clive

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<sup>2</sup> Pitlochry Festival Theatre, *Advancement Programme: Business Planning and Change Management Project, Tendering Brief*, Pitlochry, Pitlochry Festival Society Limited, 2002, p.4.

Perry, director of productions Ian Grieve and chief executive Nikki Axford. I had the benefit of several group meetings, at which actors, designers, production staffs, administrators, front of house, catering, marketing and others contributed their expertise. I hope that this review reflects their knowledge, ideas and experience. Everyone at the theatre was welcoming, friendly and open-minded; they have given a great deal of time to the “advancement” process, especially given that this was the busiest period of the theatre’s year. A list of people consulted is provided in Appendix 7.1.

The Board of Governors’ advancement strategy group at a meeting on 12 July 2002 considered a draft of this review.

## *2.2 Some current challenges and organisational factors*

- By March 2002, Pitlochry Festival Society Limited was running on a bank overdraft of more than £1.2million. Because of a capital refurbishment programme and the Garden project, the Society incurred ominous excesses of expenditure over corresponding income. The buildings work had overrun by £484,000 and the Garden project by £259,000. There were trading losses of £145,000 as at 31 October 2001 and the interest charges of servicing the overdraft were escalating. These factors, together with an overstatement of grant prepayments of £100,000, meant that the Society had an accumulated deficit of £988,000.<sup>3</sup>
- Against this outside deficit, Pitlochry has been in a transition phase of considerable uncertainty for three years: firstly, festival director Clive Perry would have retired in 2000, but in that year the company’s administrator Sheila Harborth died and as a result he has continued in post; 2001 was his final season, and this year he is with the company in a mentoring and advisory role but will leave in October 2002. The long-time chairman of the governors, Gordon Hallewell, relinquished the chair through ill health (but remains on the Board of Governors); the succeeding chair, Robin Douglas resigned in January 2002 also because of ill health, continued to be a governor but died in June. The chairman since January 2002 is David Pighills. Unsurprisingly, these sad and unsettling events have conspired to complicate the organisation of the Festival Theatre; the achievement of producing the 2002 season and keeping the theatre open has detracted from strategic planning.
- An interregnum management runs the theatre in 2002/3. Nikki Axford, former general manager of the Royal Lyceum Theatre Company, Edinburgh and a Scottish Arts Council drama officer, succeeded Sheila Harborth (as general manager) in April 2001; her contract was amended for 2002 and 2003 and for these two years, she is styled chief executive-and-executive producer. Ian Grieve, an experienced Pitlochry actor and director – who is directing

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<sup>3</sup> For further analysis of these summarised and inexact financial factors, see Benham Conway Arts & Media Limited, *Pitlochry Festival Theatre, Financial Position Report*, Pitlochry, March 2002.



*Absurd Person Singular, The Hollow and The Haunted Man* in 2002 – is engaged as director of productions for this year and 2003.

### 3. THE ARTISTIC 'VISION'

#### ***3.1 The continuity of tradition, the broad scope of play selection; options and principles for future plays selection procedures and repertoire development***

During the course of consultations with Pitlochry staffs, I was impressed by how the theatre has responded to the tastes, interests and ambitions of theatregoers. It has done so to an unusually precise, subtle and thoughtful extent. For many years, especially during the Kenneth Ireland era, there was a basic 'formula' – 'low-lowbrow to high-highbrow' – that sought to offer a mixed programme of overarching middlebrow allure, which encouraged tourists to include the Festival Theatre in their pleasures. The Sue Wilson three-year transition phase was the only period when this theatre had an artistic director working equally with an administrator. The artistic director's responsibilities were confined mainly to play selection and production in isolation; arguably, the balance of policy might be said to have shifted away from theatregoer focus: audiences decreased from approximately 65,000 annually and in 1986, there were only 44,429, being an average of 49 per cent full. The festival directorship of Clive Perry has again been determined by a canny combination of business acumen (that is to say giving people what they want) and audience development (that is to say giving people what they think they want). At the same time, Pitlochry has responded to shifting audience tastes and aspirations by offering five 'middle-ground' plays and one 'prestige' play.

Contrary to many widely-held prejudices (not least those of younger theatre-makers, some Scottish critics and many arts administrators), audiences – even those on holiday at Pitlochry – *are* willing to be challenged, and it is notable that during Perry's era, the theatre has been increasingly inclined to be upfront about promoting new drama and less inclined to sneak it in by the back door in the hope that the audience does not notice. Even so, new drama and classical revivals are the highest risk and fewest performances are given to these 'prestige' plays. Examination of the calendar reveals the exercise of a shrewd balancing act; the festival director receives expert counterpoise from the theatre manager, Margaret Pirnie, who schedules the ballast of comedies and thrillers (circa 30 performances) against the 'prestige' production (circa 15 performances). She does this not only from knowledge of the statistics but from seventeen years' face-to-face acquaintance with the theatregoers; she listens to the public and knows the degree to which they are inclined to seek more than sheer entertainment.

Within this broad policy, Pitlochry has revived Scottish drama – especially the recall of James Bridie (e.g., *Daphne Laureola*, 1988; *Mr Bolfry*, 1996) and J.M.Barrie (*Dear Brutus*, 1989; *What Every Woman Knows*, 1991; *The Will, The Old Lady Shows Her Medals, The Twelve Pound Look, Shall We Join the Ladies*, 1994; *The Admirable Crichton*, 2001) and has given new opportunities to living playwrights through commissions, most especially the new adaptations of John Clifford (*La Vie de Boheme*, 1993; *Wuthering Heights*, 1995; *Great Expectations*, 1999; *The Queen of Spades*, 2002; *Charles Dickens: The Haunted Man*, 2002, first given as a foyer performance in 2001, since reworked and developed, and toured to St Andrews, Dundee and Dalry). Clifford is

an example of a successful and continuing playwright-theatre association.<sup>4</sup> This is the marker for the Festival Theatre to include something that makes the audiences (and critics) bristle with curiosity.

It is difficult to anticipate the domain that Pitlochry might wish to chart in the next five years; that must await the appointment of a new leadership, howsoever the Board of Governors determine the senior management structure. The selection of plays speaks for itself; it is the theology and kernel of all policy. Selections do not proceed through the language of strategic management; not only do brilliant playwrights not emerge at predetermined intervals, but also the company is dealing with commodities whose success in the market place is always unpredictable. There are no automatic criteria as to what ought to be staged and what should not be staged. It is important, therefore, to respect the realities of the core audience's enthusiasms so that the wheel is not reinvented, for Pitlochry Festival Theatre is not to be regarded as strictly comparable with other Scottish theatres.

The next artistic leadership must have knowledge of (and an enthusiasm for) many of the staples of the Pitlochry repertoire that differs from other theatres in Scotland: Alan Ayckbourn, Noël Coward, Ben Travers, Agatha Christie, J.B. Priestley, Bernard Shaw, Oscar Wilde, Somerset Maugham, Jean Anouilh, Arthur Miller and so on. However, even after fifty years' programming, there are many playwrights who have achieved box office success and for whom interestingly staged revivals might offer fertile soil for Pitlochry theatregoers and the next Pitlochry leader. In the same way that Pitlochry has done in the past – or that some other respected companies such as the Orange Tree at Richmond, Oxford Stage Company and the Lyric Hammersmith have done today – Pitlochry might consider such past successes from Will Evana and Valentine, John van Druten, Dorothy and Campbell Christie, Rodney Ackland, Gerald Savory, Eden Phillpotts, Edward Percy, Arthur Conan Doyle, Walter W Ellis or even a revue revival, court-room dramas, drawing-room comedies or other period phenomena that were once immensely popular and could be culturally significant today. Within the current policy – or, by extension, selection of hitherto undiscovered popular plays from 'national theatres' in theatrically advanced countries such as New Zealand, Australia and Canada – a breadth of choice offers persistent artistic opportunity through new perspectives; box office success and critical acclaim need not be mutually exclusive. This might lead to more national critical attention. The need for the next leader to demonstrate encyclopaedic knowledge and exercise critical judgements about world drama and dramaturgical potential is the essential competency from which all credibility will emanate: *'the play's the thing'*.

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<sup>4</sup> The company has published accurate records of play-lists and personnel in George Bruce, *Now we are twenty-five 1972-75: an account of the four years after the 21st of the Pitlochry Festival Theatre*, Pitlochry, Pitlochry Festival Society Limited, 1976 and *Commemorative Issue: Pitlochry Festival Theatre 50<sup>th</sup> Anniversary – 50 Glorious Years*, Pitlochry, Pitlochry Festival Society Limited, 2001.

### 3.2 *The importance of keeping to the festival ideal*

The suggestion of rediscovering old plays or staging other 'national theatres' is not a prescriptive artistic policy; but people attend a festival as a source of renewal and a break from routine and work. Therefore, although one expects the play choices to be always of high quality, at a *festival* they should be genuinely surprising, astonishing and *unforeseen*, fuelled by a spirit of *exploration, adventure* and *fun*. It might be argued that it is not too difficult to select plays of high merit, but it is certainly trickier to make the experience an exceptional one. Not every play given at Pitlochry would thrill a public elsewhere, and nor should they. Rather, they should not even be repeatable elsewhere in Great Britain. The Festival Theatre experience should be exceptional – even for theatregoers from elsewhere in Scotland where many of the Pitlochry actors may be seen at other theatres in the autumn and winter. Ideally, Festival Theatre play choices should have a special one-off, exclusive flavour and, when the plays are commonplace – as some may inevitably seem to be – it is the location that compensates. The Festival Theatre whereabouts is the most dramatic setting of any British theatre; far more inspiring than the festivals at Glyndebourne, Aldeburgh, Chichester and Buxton, or even the Theatre by the Lake at Keswick.<sup>5</sup> Theatregoers are away from home, away from the city. Subliminally, they expect the exceptional location to generate exceptional performances. It requires a willing suspension of disbelief, because the public like to think that that what they are seeing is something uniquely creative going on when an ensemble of actors gathers for re-interpretations of a popular play. The company has earned this illusion over fifty years; it should not be shattered by the funding bodies' expectations for an 'integrated' Perthshire and Scottish theatre scene; integration proceeds from the engagement of Scottish actors and personnel who come from – and return to – other theatres. The message of the festival ethos is a proud scenario, and should be accentuated in all marketing and fundraising strategy, whether to the public, the funding bodies or the media. Pitlochry should not be a branch office of any other theatre. The word 'festival' is the most valuable marketing tool in its business; Pitlochry has to persuade everyone that what it offers is special, not routine. When this boils down to a play *revival*, the value lies not only in the performance and interpretation, but also in the context, the opportunity to explore the Festival Theatre Garden and the hills during the day, the friendly atmosphere of the town, the gregarious welcome of the Festival Theatre staff, and the gastronomic arts of the Festival Theatre restaurant, set before the breathtaking scenery.

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<sup>5</sup> The 400-seat Theatre by the Lake – which in some ways is a comparator theatre for Pitlochry – is situated between a car park and Derwentwater. It is the home for Cumbria's theatre company and, like Pitlochry, produces traditional summer seasons of drama, but without the sense of a festive celebration. The repertoire is smaller scale to Pitlochry, and contains work that is rather more contemporary. The theatre is in a more populous area, and the 2002 season (that performs in repertoire with a small ensemble) is *All My Sons* (Arthur Miller), *Speed-the-Plow* (David Mamet), *In Flame* (Charlotte Jones) and Stephen Mallatratt's adaptation of *The Woman in Black* (Susan Hill). The Theatre also offers film screenings, music and mini-festivals. It hosts regular arts and crafts exhibitions. Its managers have visited Pitlochry this year.

### 3.3 The actor and director at Pitlochry

The next bedrock for artistic vision at Pitlochry Festival Theatre is the actor. The company contracts an ensemble company of actors (17 in 2002)<sup>6</sup> for each season with members appearing on average in three or four of the five or six productions. No one is idle. Equity emphasised to me that, all-in, there are more actor-employment weeks at Pitlochry than at any other Scottish theatre. Many actors are regular members of the festival company and are well known to the theatregoers. (In the 2002 season, for example, 11 of the 17 actors have appeared at Pitlochry before). Pitlochry also has a long and honourable tradition of providing training opportunities for new members of the profession, with some company members each year being recent drama school graduates.

Through the continuity of the ensemble ethos for 51 seasons, Pitlochry has provided actors with the experience of good, solid 'rep' work – rehearsing more than one play at a time, rehearsing one play during the day while performing in another in the evening, playing a variety of large and small roles. For many years, during which time ensemble disintegrated elsewhere, this was unique in Scotland. Perhaps location has sustained the ideal, with actors' joining for the combination of place and the range of acting discipline; certainly many other theatres, such as the Royal Lyceum Theatre Company, Edinburgh, have tried to emulate the Pitlochry model in their 'advancement' plans. Until the re-establishment of ensemble at Dundee Rep – that might be said to have surpassed Pitlochry in Scottish Arts Council, media, and peer-theatre attention but only achieved with substantial grant uplift above core funding – other theatre companies achieved ensemble only fleetingly; indeed it is rarely seen nowadays elsewhere in Britain, even at the Royal Shakespeare Company.

Importantly, during interviews for this review, actors emphasised the great advantage of rotating productions from night to night (and from matinee to evening); it protects them from the potential lethargy of performing the same lines and characterisation repeatedly for three weeks and 24 consecutive performances. Thus, the practice of repertoire casting and schedule, including switching actors off from night to night, intensifies the spontaneity of Pitlochry performances and, further, stimulates versatility, in contrast to the 'run of play'. By constantly performing together in different plays, Pitlochry actors have to give and take, and to help each other. Their performance is sharp. They come to project a more intelligent understanding of and insight into the playwrights' work. The effect of any single performance in any production is also due to the responses the actor gets from other actors. Constant association enables actors to play up to each other. The *younger* actor becomes the *experienced* actor. In the Pitlochry system of six months' run, the actors come to 'learn' each other's role, and it is in each member's interest to serve this teamwork, in order that they may be served by it; there is no unfair prominence. It is from these considerations that the Pitlochry Festival Theatre attains its high level, vitality and reputation. Each actor gets more and better chances of showing what

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<sup>6</sup> The size of the Pitlochry ensemble has remained impressively consistent over time. (There were, for instance, 20 actors engaged in 1972). The need to improve marketing and management – that are essential creeds of the concurrent "advancement" reviews – must be achieved by keeping the proportion of actors' expenditure outrunning that bestowed on administration, so that unlike other theatres, artists remain the nerve centre of the Festival Theatre.

they can do. This is an immense contribution to actor training in the Scottish theatre; a priceless commodity for the proposed Scottish national theatre; and a core attribute that meets the training objectives of the *Scottish Arts Council Drama Strategy*. This is also a production system that must continue to be led by the unswerving attentions of an accomplished theatre leader. In passing, it was also noted by actors that because the repertoire system keeps productions alive for six months, on the occasions when a Pitlochry production has been singled out for subsequent tours to the central belt, actors' performance changed; the show lost some of its unmeditated, surprising acting quality.

Pitlochry is a bona-fide 'company' – with all the characteristics that this implies: enormous stamina and discipline is required from the actors; there is an inevitable and understandable emphasis on technique; the ensemble forges a closer, more intimate playing style than can be given in one-off theatre productions; the audience (some of whom see several productions each year, whether on consecutive nights or at intervals) enjoy the opportunity to see an actor playing a variety of roles each season, and so on.<sup>7</sup> This recurring relationship between actors and audience is key to much or all of Pitlochry's activity and helps insulate the company from some of the worst excesses of artistic introspection and 'navel-gazing' that detractors of, for example, the Royal Shakespeare Company, often claim to detect in that particular company's work today.

To understand the demands placed on actors and creative personnel at Pitlochry one must appreciate the necessity for advance planning: the choice of plays for the 2003 season, for example, was framed as early as November 2001, and the planning cycle obliges a discipline of preparation and work for three years' seasons simultaneously. With this longer-term preparation, actors are offered more to get off the treadmill of casual engagements in Scottish central belt theatres; the ensemble enshrines the merits and few of the bad things about the 'factory' process of production. Often, it has been shown to be advantageous for Pitlochry to be able to include the names of audience favourites such as Russell Hunter, Una McLean, Michael Mackenzie, Martyn James et al in the advance publicity for the following year's season. But this requires a contractual commitment on the part of the actor more than one year in advance that runs counter to the prevailing 'freelance' orthodoxy and the instinct of most actors (and their agents) to hang on to the last possible moment before committing to a theatre production in the hope that more lucrative film and television work will gallop to their financial rescue.

Likewise, in order to fit into the production-and-workshop cycle, freelance directors and designers (the festival director rarely directs more than two productions per season and even when a designer has been in residence he or she has designed no more than four of the six productions) are required to commit to a production and to submit working drawings up to a year in advance of the first day of rehearsal. The

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<sup>7</sup> I find it coy that the Festival Theatre does not flourish the ensemble as a key selling point. For instance, neither the 2002 season brochure nor the otherwise excellent website make mention of the resident characteristics; admittedly, nine actors are named on the cover of the brochure (which may be printed before everyone is contracted) but more could be divulged *before* a patron arrives at the theatre. Once at the Festival Theatre, the ensemble excites theatregoers; they recognise their favourite performers in the Leon Sinden Awards, where they have voted annually since 1995 for Best Actor and Best Actress in Supporting Roles.

production manager will have prepared a fabrication schedule, which makes full and efficient use of the carpentry, painting and wardrobe resources; the production staffs are therefore preoccupied with complex preparations year-round. Pitlochry is a place for accomplished and experienced theatre professionals, not prima donnas.

Whilst individual play directors may be invited to make suggestions for future programming, they more often are likely to be invited to direct plays already selected by the festival director. In turn, the festival director will be mindful of theatregoer tastes and, as discussed, the need for a balanced programme that offers the range of plays and roles that will entice theatregoers to make more than one visit annually – and sufficient ‘leading’ roles for the noteworthy senior players she or he hopes to persuade to commit to a season perhaps as much as a year ahead. I return to discussion of the festival director function later but, for now, guest directors are, therefore, more likely to direct plays that fit in with the season as a whole and for which there may already be some cast members in place. They might also be required to work with an in-house or resident designer and lighting designer, the selection of who is beyond their control. Thus, even greater reserves of tact, diplomacy and craftsmanship will be required of a guest director at Pitlochry than might be the case elsewhere. Moreover, the need for planning cannot be overemphasised here; set and costume designs will need to be finalised as far as a year ahead and an accommodation reached with other directors on the matter of common décor and lighting rig elements in the speedy changeovers of nightly repertoire. There are strengths to this system: the directors need to be dramaturgically rigorous and to analyse the options in advance of rehearsal; decisions must be taken before too long. At Pitlochry, the production cycle plainly begins farther in advance than at any other Scottish theatre; the system is more like Scottish Opera than other drama companies. If opera directors can commit to and prepare a production one or two years in advance, then why should a theatre director not be able to do likewise.

The Pitlochry system does not imply any lack of opportunity for creativity; rather the reverse in fact. Preparation affords the director – and a trainee who might assist them – the chance to be more thoroughly familiar with the requirements, strengths and opportunities of a particular production than would be the case if he or she were pitched headlong into the process with less notice and the minimal forethought that is seen at some other theatres. For experienced and less seasoned directors alike, the magnitude and intensity of the Pitlochry repertoire system and its six-play output offers an invaluable inurement which, in British drama, can now only be obtained in the similar professionalism of the National Theatre [of Great Britain], the Royal Shakespeare Company, Chichester Festival Theatre and, to a lesser degree, the temporal or fewer-plays-mounted-at-once repertoire at Dundee Rep, Northern Stage (Newcastle upon Tyne) and, from late-2002, the Manchester Royal Exchange. The Festival Theatre offers one of the best training grounds for emerging directors in British theatre.

### ***3.4 Sunday concerts and visiting productions***

On twelve Sunday nights during the 'high' season from mid-June to the end of the repertoire season in late-October, visiting concerts are presented on the main-stage. In 2002, they are budgeted to take approximately £75,000, and after fees or box-office share to the promoter of approximately £40,000, the Festival Theatre budgets to retain £35,000. If achieved, this margin of 46 per cent is an exemplary return (most middle-scale theatres achieve only 20 per cent on a similar programme). The series is low-risk and the attractions are well aimed for the Pitlochry audience. It would be rash to attempt any uncertain artistic 'development' for Sunday nights.<sup>8</sup> [The matter of the 'bonus week' of five performances is discussed later].

Less profitable are those foyer events presented when the main-stage is unavailable during 'production weeks and dress rehearsals'. Six smaller concerts are budgeted in 2002 for an average attendance of 130, with fees to artists in near equilibrium to receipts. The benefit derives from keeping the theatre and the catering open, and there seems no reason for change.

### ***3.5 A national training role for the Festival Theatre***

Future Festival Theatre activities might not only include producing theatre, but also formalising the training of the next generation of theatre-makers, technicians and even managers. Underlying the basis of policy, this has of course been one of the company's contributions to the theatre industry for over fifty years, but because of the dilapidation of ensemble elsewhere, this contribution is more important in the future. The theatre and its festival ethos provide a supportive atmosphere in which to learn; during my consultation, younger actors and the stage management testified that through the challenges of working at Pitlochry on the repertoire system, they are given educational and career advancement opportunities seldom available elsewhere in Britain. In fact, upon completing a season at Pitlochry, some maintain that they learn more in one summer than throughout a three or four years' undergraduate theatre education. Through his close relationships with many Pitlochry alumni, the festival director Clive Perry has often offered them the chance to return to further their craft.

Once the next artistic leadership has become naturalised to the Pitlochry customs, opportunities for accentuating this training role beyond the ensemble will transpire. A programme of internships and assistantships could be formulated in conjunction with the Royal Scottish Academy of Music and Drama and the conservatoire at Queen Margaret University College, Edinburgh and, for dramaturgy (including

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<sup>8</sup> Although Sundays afford the resident company their day-off, whilst keeping the restaurant open, it might be worth estimating the financial cost-benefit and logistical consequence of exchanging Monday night's resident company performance with the visiting concert, for those weeks after mid-July when the company is not rehearsing in the day. Perhaps the exchange would be for Sunday afternoons at 4pm. Perhaps this matter may not be worth a second thought; the custom and expectation of regular attendees, as well as extra pay to actors and stage management, may outweigh a change.

literary management, publicity and editorialising), with the department of theatre, film and television studies at the University of Glasgow. Possibly, should the company employ a leader whose career has included periods of teaching (as has that of Clive Perry through his drama professorship at Edinburgh), theatre research or scholarship, the next leader will have the entrée for developing a corollary policy for summer schools, lectures, symposia, criticising plays and publishing;<sup>9</sup> certainly no other Scottish theatre is formally oriented to the academy; apart from vocational theatre training there is, to all intents and purposes, a mutual excommunication between drama departments in universities and the 'rough trade' of British theatre. In many ways, the aspiration might be to emulate the inextricability witnessed in United States and Canadian 'summer stock' theatres and their university 'producers'.

### ***3.6 The educational basis of Pitlochry Festival Theatre and options for the future***

Pitlochry might have the creative, festival aspiration and uplift of the Williamstown Theatre Festival (nestled in the Berkshire Hills of West Massachusetts, where two hundred aspiring theatre workers collaborate with accomplished mentors in a highly creative atmosphere), or the Shaw Festival at Niagara-on-the-Lake, Ontario. Like the *festival ideal* at Pitlochry, these rural or small-town locales offer theatregoers, students and artists the chance to admire, room to wander and, most important, room to think. Intriguingly, the founder of the Shaw Festival, Brian Doherty, referred approvingly to the pastoral Pitlochry serenity as part of its mainspring when established in 1962.<sup>10</sup> Since then, the Shaw's educational role has – like other features – known no bounds by comparison. Today, they organise lecture series, pre-show briefings (which were begun at Pitlochry in 2002), Saturday conversations, backstage tours, teachers' days, and a four-day seminar with an accommodation option ('the spring hostel').<sup>11</sup> At the Stratford Festival, Ontario, the education and training role goes even further: in 2002, a three-day symposium brings together Canadian playwrights, academics, artists and audiences; appearances by writers; a reunion weekend for company alumni; a theatre composers' competition; and storytelling lunches. Its Stratford Academy (which I suspect is, by a nice irony, the model for the Royal Shakespeare Company's new 'theatre village') offers courses for university credit in voice and movement for the theatre, drama courses for teachers, an annual drama teachers' conference, voice care and development for educators, Alexander Technique workshops, text and voice classes, property making, training in millinery and jewellery techniques, costumes decoration, dramatic-leadership and learning

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<sup>9</sup> In passing, it is to the Festival Theatre's credit that a production and business archive has been maintained. This is stored outwith the theatre, at Pitlochry and theatre manager Margaret Pirnie is the keeper. The critic Cordelia Oliver in her study of the Festival Theatre made use of it (forthcoming). The repository, which includes costume drawings, publicity material and production photographs, should be catalogued on the website, becoming a resource for an education programme, as is demonstrated in many North American and Australian repertory theatres and arts centres that have stimulated their education work through an integral museum. However, many records to 1981 were removed by Kenneth Ireland, and are now in the possession of his family at Edinburgh. I understand from Cordelia Oliver that they would be pleased to see it returned to Pitlochry for safekeeping.

<sup>10</sup> Brian Doherty, *Not Bloody Likely: The Shaw Festival 1962-1973*, Toronto, J.M. Dent, 1974, p.9.

<sup>11</sup> <http://www.shawfest.sympatico.ca>



programmes for corporate executives.<sup>12</sup> People go to these festivals because their spirits are raised; in North America, like the Edinburgh International Festival, their expansion has been to do with the exclusivity of the programme and the synchronous education and training programmes.<sup>13</sup>

### *3.7 The good audience, the new audience and the limits of appeal*

Crowded houses are exhilarating; but their demography seems to be a concern to the funding bodies which, like the observations made in the concurrent marketing review – or can be witnessed at most nights at the Festival Theatre first hand – are comprised of ‘senior’, leisured theatregoers. At Pitlochry, most people are on holiday; they come to be entertained and that is good, even if the Pitlochry tends not to have the fortune of a haphazard, mixed community of negotiable size, background and age that attend some metropolitan theatres.

There is of course an art to listening to a play. Five minutes into a performance will distinguish a good audience from a bad one; and numbers have nothing to do with it. Therefore, not the least of the tasks of the Festival Theatre is to develop out of the paying public an audience that will be sensitive, appreciative, and critical. The Pitlochry actors emphasised that their public is extraordinarily attentive and responsive. The seasoned Pitlochry actors said that, over time, the core audience has been formed and that they can be regarded as an integral, albeit not too rigidly calculable, part of the Festival Theatre’s atmosphere. Sometimes, they said, the choice of play expresses the ageing experience. Certainly, in order to receive public subsidy and keep in a state of constant renewal, Pitlochry must attempt to lead the public’s opinion, and not always follow it. On other occasions, as with the annual ‘prestige’ production, the company forces the pace. This is a touchstone of ‘audience development’. The core audience must act as a determinant in artistic policy, on this basis Pitlochry budgets more accurately than many other theatres.

Demographics prove that senior citizens are a growing percentage of the population – and that probably goes for all mainstream theatres. It is too easy for younger theatre-makers and the funding bodies to see this as a drawback, rather than the ‘audience development’ opportunity it can be. ‘Modern maturity’, ‘senior

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<sup>12</sup> See ‘Beyond the Stage’, in *Stratford Festival of Canada: 2002 Visitors’ Guide*, Stratford, Stratford Festival, 2002, pp.38-50.

<sup>13</sup> The Williamstown Festival, the Shaw Festival and the Stratford Festival are summer drama festival theatres *sans pareil*. Their visions and accomplishments surpass any contemporary British comparators, such as the Chichester Festival Theatre and even the laudable Theatre-by-the-Lake, Keswick. The Pitlochry business development manager, Sarah Mackenzie (who I interviewed for the fundraising strategy review), visited Canada to study these counterpart theatres and, hopefully, to assist the revitalisation of the Pitlochry Festival Theatre. She offered excited observations on their individual giving, membership and sponsorship schemes, notwithstanding that country’s different tax regime and entrepreneurial culture. For this review, their theatre-making and management anatomies are equally pertinent. It would be rewarding for Pitlochry to enquire further, perhaps through manager-internships and exchanges or, eventually, a production alliance. On a smaller-scale, Ontario has sixteen other professional summer theatres in other small towns; like the Federation of Scottish Theatre membership, these autonomous theatres affiliate through The Association Summer Theatres ‘Round Ontario. See <http://www.summertheatre.org/indexnew.htm>

adulthood', 'new age' or whatever label is used, offers singular opportunities for fulfilling the vision of an education programme.

Whilst it would be irresponsible of Pitlochry to deceive itself by attempting through play-choices and marketing to deviate too abruptly from continuing to entertain the paramount audience, their designation can be more elastic. For its own sake and that of the backers, the company should try to keep free of the prejudices of any one type of public. One way of enticing a crosscut through the wider community of theatregoers is through the backpacker market. This cosmopolitan public is in the vicinity, staying at the large hostel; with few competing evening attractions, the theatre could offer of stand-by and incentive tickets, as well as a refashioning of the season brochure. [see Marketing Review for more discussion and recommendation]. The essential requirement is to respect the limits of appeal.

### ***3.8 Winter and spring programming; the amateur theatre; the youth theatre; the theatre's relation to the touring circuits***

The Atholl Players (and their adjunct Atholl Players Youth Group) are based at Pitlochry, and the club is open to anyone interested in drama. The Festival Theatre has an honourable record of affiliation with them, as when, in 2001, the group provided supernumeraries for *The Admirable Crichton*. Perhaps their members are the nucleus of a youth theatre at the Festival Theatre, but empire building must be avoided. The Atholl Players put on three to four productions each year at the Pitlochry Town Hall, including entries in the Scottish Community Drama Association 'one act' festival, whose 2002 Northern District event was held at the Birnam Institute, Dunkeld over four days in February-March.<sup>14</sup> Twelve groups participated, including community theatres in rural Perthshire such as the Scrap Happy Theatre Company, the Unmasked Drama Company, the Blairgowrie Players and the Aberfeldy Drama Club. Now that Pitlochry Festival Theatre is insulated for winter use,<sup>15</sup> the theatre would be a splendid locale for this festival – as indeed it would be for the four national divisions (and 23 districts) of the entire Scottish Community Drama Association membership, who could, in the event of a national festival, be expediently accommodated at local hotels in their 'off-season'.<sup>16</sup> There is also the opportunity to work with Scottish Youth Theatre (and others) for residencies, festivals and internships. Thus, the theatre's 'festival' ambience could be extended intermittently; similar enterprises have, for instance, been a fertile activity for the Opera House in the High Peak resort of Buxton where, after that theatre's reopening in 1979 the summer opera festival was turned towards year-round programming through the spur of amateur festivals' utilization.

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<sup>14</sup> <http://www.scda.org.uk/history>

<sup>15</sup> Radiators were fitted in the foyer areas, but the potential to keep the auditorium warm in winter is, according to the Festival Theatre architects, doubtful; they had in mind a lengthening of the main season at the beginning and end.

<sup>16</sup> For an up to date panorama of amateur theatre in Scotland – from which the Festival Theatre might be prompted to other affiliations, see Greg Giesekam, *Luvvies and rude mechanicals? Amateur and Community Theatre in Scotland*, Edinburgh, Scottish Arts Council, 2000.

There may be occasional opportunities to produce 'mini-festivals' of professional theatre in the 'off-season'. The example of the first British 'Pride of Place: a Festival of Rural Touring Theatre' comes to mind. This was held in March 2002 at Salisbury and nearby villages. Over four days, seven companies staged seven productions and fourteen performances, one conference and eight workshops. Companies were The OTTC, Forest Forge, New Perspectives, Proteus, Eastern Angles, Northumberland Touring and Pentabus. Patrick Sandford chaired the conference element, which debated the question *what is a national theatre?* Manifestly, Pitlochry Festival Theatre would be an ideal location for a second event, to include Scottish rural touring. In turn, the next artistic leader – through his or her networks and intuitions – will need to inspire other quality summits, such as botanical conferences, writers' and readers' retreats, PBFA book fairs, and so on.

Programming legitimate theatre productions during the 'out-of-festival' season is a relatively undemanding part of the challenge; if the management know how to negotiate the best terms for tours-in and that they do not make a loss. Probably, the best that the theatre can hope for is to break even; and that will an achievement. In the first years, contracts must be on share-terms (certainly not on guarantees) because there is no extra subsidy and no assured market. It will take considerable skill to entice professionals in the winter; amateurs and conferences bring their own audience as well as providing a community service. If Pitlochry wants to be a small-to-middle scale receiving venue in the winter, it should study the fitful programming of resort theatres on the No.3 touring circuit such as the Regis Theatre at Bognor, the Gorleston Pavilion Theatre at Great Yarmouth, the Nova Theatre at Prestatyn, or the Theatre in the Forest at Grizedale; the Board of Governors must remember that programming a receiving theatre is principally led by the audience available and not by the scale of the venue. The impending attendance and profitability for the Pitlochry 'bonus week' ending 25 October 2002 will signpost the business realities of pursuing these new missions. In the event that the theatre does not make money with something as popular as *Sunset Song* – or reach the guaranteed fee for the single performance by the Scottish Dance Theatre – Pitlochry must have serious reservations. Furthermore, much of the alluring 'festival environment' vanishes in winter; it is dark and bitterly cold outside. I doubt that the winter programme can yield as pronounced an increase in net receipts as could the relatively painless efforts of marketing the unsold tickets of the summer festival.

### ***3.9 The marketing and programming of events in The Garden; the amphitheatre; the educational potential of The Garden***

The opening of the Scottish Plant Collectors' Garden is a fine opportunity to add a new dimension to artistic policy at the Festival Theatre. Of course, it is a work of art itself: the marketing challenge is to take the elements of the Garden – images and ideas of nature – and convey a sense of purpose, form and beauty that links with the Festival Theatre. In many ways, the purpose of the garden is the same as the theatre: to transform nature into order, form and art. Even so, there are two identities and they should have clear brand images that can be promoted separately and, sometimes, together. There is overlap but there are people who only go to theatres and only go to gardens. A clear image would be developed with the adoption of a

name that linked to the theatre; perhaps derived from dramatic literature. An education programme should be established, perhaps offering horticultural diplomas accredited by the University of the Highlands and Islands or the botanical gardens at Edinburgh (which have an academic dimension through the University of Edinburgh).<sup>17</sup> Gardens are visited by the house-proud year round; they view them as an extension of themselves. There is a considerable media opportunity to promote the Garden and the Festival Theatre through specialist magazines. The Garden offers the opportunity for catering to be year round, even if frequenters only go into the theatre foyer for a sandwich. There might also be a Garden centre shop; these make money elsewhere.

The strategy should be to promote the Garden *as a garden*, before an overtly theatrical overlap. There are theatre companies that specialise in outdoor performance, such as the new Glasgow Repertory Company who perform Shakespeare at Glasgow's botanical gardens this year, or the well-established Illyria Theatre whose open-air productions are staged at Holmwood House at Cathcart, Glasgow, Culzean Castle at Maybole, Drum Castle at Aberdeen and Haddo House at Montrose.<sup>18</sup> These companies may be appropriate choices for seasons in the new amphitheatre, especially if the stage or seating is to be under canvas. The unpredictable nature of the weather means that pluvius insurance premiums would be excessive. However, summer performances in the Garden would surely compete too much with the main-stage, until the business is back on an even keel. Meanwhile, it might be possible to stage an in-house production where the first act is given inside, and the second act in the Garden (as at the Watermill Theatre near Newbury this year), or for a long interval to be scheduled so that patrons could picnic in front of the Festival Theatre or saunter with drinks in the Garden. The notion of a series of high-priced gala-night performances comes to mind; overall, the opening of the Garden evokes the prospect of capitalising more on the Festival Theatre's external 'front of house', as do Glyndebourne Festival or the Watermill Theatre.

### **3.10 The purpose of the art exhibitions**

The Festival Theatre Gallery has run-on since the company was founded; three exhibitions are curated annually, with over forty artists' work on exhibition and for sale. Like the acting company, many of the artists are established professionals, with the addition of several showing for the first time each year. The director of art exhibitions is Roy Wilson, the former general manager who curates them voluntarily in his retirement. The River Room has extended the exhibition space, offering room for larger, more expensive paintings. The displays obviously give pleasure to many patrons; they make about £15,500 net profit and the margin, which approaches 30 per cent, is the norm for any gallery. Seemingly, the main purpose of the exhibitions is to make money, and there cannot be anything wrong with that. The gallery represents good community focus, and is a proven incentive for patrons to linger longer and to visit in the day, not least during bad weather. It diversifies the Festival Theatre towards an arts centre. However, the challenge for 2003 lies in finding a voluntary-successor to Mr Wilson, whose whole-hearted service to the Festival Theatre ends

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<sup>17</sup> For further ideas, see the education programme of the Royal Horticultural Society, at <http://www.rhs.org.uk/education/index.asp>

<sup>18</sup> See <http://www.illyria.uk.com>

this year. It would be improper to pay for curatorial work: the theatre must find a new curator soon.

### ***3.11 The need for theatrical and impresarial leadership: the Festival Director, the Manager, the Director of Productions and the managerial style required***

It will be no revelation to the Board of Governors to emphasise that so much of the Festival Theatre's future success depends on the personality and inclination of the company's leader, whether that person is the chief executive, the director of productions, a festival director, an artistic director – or a coalition. Is he or she essentially a manager appointed by the Board of Governors, with a mandate to spend and control a budget and attract theatregoers? Alternatively, is he or she an artist, or at least someone with palpable theatrical sensibility and intellect, who nourishes the creative ideals and the strategic vision of the Festival Theatre? Can he or she be in any way identified as the personification of an artistic vision?

Such questions act as a sort of checklist. It all boils down to the 'vision thing', tied to the location and realities of the repertoire and audience, and the leader having the skills, energy, knowledge, imagination and determination to implement the new strategic vision. Where might the governors observe success elsewhere? Where, after festival director Clive Perry, might the Board of Governors observe a healthy balance of artistic credibility and financial stability? Where might the Board observe festival-and-theatrical leadership which is proactive rather than reactive, that provides critical perceptions of what is possible and what is impossible, that discriminates between good and bad and is able to make decisions?

The Board might consider the calculated risks, achievements and distinctiveness of Brian McMaster at the Edinburgh International Festival, Giles Havergal at the Citizens' Theatre, Glasgow, Alan Ayckbourn at Stephen Joseph Theatre, Scarborough and Jude Kelly at the West Yorkshire Playhouse, Leeds. These impresarios are the director and chief executive of their organisations; they empower their management teams but their leadership unifies every aspect of policy in their organisations. Their management structure is similar to that at Pitlochry during its periods of all round success; at the Festival Theatre, the process of theatrical management should be communication between a leader and the artists on the one hand and the public on the other. During my consultations, many people emphasised that there is a shortage of potential candidates to lead the Festival Theatre, especially someone who would be unstrung by the fundamentals of Pitlochry and not soon be ambitious for running a metropolitan theatre; the recruitment task may be exacting, but this is certainly no reason for not advertising the post, albeit with the contributions of an adviser.

### ***3.12 The duty of the Board of Governors as conscience of the artistic policy***

At all times, but especially at this time of financial perplexity and interregnum management, the Board of Governors is not only the legislative authority, but also the link between the Festival Theatre itself and the communities it serves: the artists, staffs, the audience and the other stakeholders. It is governing an artistic policy in which it has always taken a kindly and enthusiastic interest, but about which it has moderate technical knowledge, especially of external trends in theatrical

management. The present membership – together with the advice of the honorary patrons – no doubt worked well during the years of Clive Perry’s authoritative festival directorship. Nevertheless, the Board of Governors must know, severally and collectively, in practice and in general terms, what it really wants to do now, and, later it must be constantly useful as a critic to the new leader. The better the leader, the freer hand he or she will demand, but no incomer should want a freedom that becomes isolation. The board’s criticism of the artistic policy must be well instructed. Everyone is – or thinks they are – competent to criticise artistic policy, and it is true that individual governors do know a lot about the Festival Theatre; in any case, the company is not in the business of producing esoteric art. Nevertheless, what may be desirable in the immediate future are the contributions from a new Governor or Governors from the theatre industry (in addition to other business and strategic planning skills). Firstly, a person might come from within the company, by the election of a Governor by the staffs and actors. This would be a progressive gambit if the constitution will permit it under the Companies and Charities Acts. Secondly, I suggest that there might be another Governor co-opted from the wider theatre industry. By these means, the new leader, the employees and other stakeholders would have renewed confidence in the Board as the conscience of artistic decision-making.

#### **4. EXTRA-ORGANISATIONAL FACTORS: THE PROMISE OF COLLABORATION WITH PERTH THEATRE**

##### ***4.1 Impetus and objectives: an intuitively attractive notion for Perth and Kinross Council and the Scottish Arts Council***

All future policy at Pitlochry is entangled with the question of collaboration with Perth Theatre. Management affiliation between Pitlochry Festival Theatre and Perth is an intuitively attractive notion for the funding bodies, so much so that the 2002 Scottish Arts Council grant conditions state that one of four ‘critical success factors’ this year must be

To examine and decide on the nature and scope of future collaboration with Perth Theatre, on the understanding that the status quo is not an option.<sup>19</sup>

The notion has also elicited considerable support from the Perth and Kinross Council and the Pitlochry Festival Theatre Board of Governors has agreed to examine the options as part of the ‘advancement’ strategy. The subject of mergers and cooperation is not a surprising one; over the past fifteen years, Scottish Arts Council has put most new money into brand new arts organisations and the result is that the Scottish theatre industry is over-crowded with a proliferation of discontinuous new touring companies, all with their own infrastructures and financial difficulties: the pressure on drama subsidy is intense. This is the root of the problem for Pitlochry (as it is for all building-based producing companies in Scotland, a nation which is simply too small to support all these imbricated, latter-day ‘initiatives’).

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<sup>19</sup> Graham Berry, *Funding Agreements 2002/2003: Letter to Chairman David Pighills*, Edinburgh, Scottish Arts Council, n.d., 2002; see Funding Agreement; Schedule One, p.1.

At Perth, the council will build a new 1200-seat concert hall (total capacity 1600, including standing). A 'flexible' venue of this scale, programmed with a succession of one-night stands, exhibitions and conferences, customarily requires at least £800,000 annual revenue subsidy for its operation. For a relatively small city of 41,490 people,<sup>20</sup> the proposition seems daring to say the least; pressure on the council's revenue grants is - or will become - correspondingly strong. The new concert hall is to be a component of the city's ambitious 'cultural campus', comprising the Fair Maid House, the George Inn Lane Arts Centre and Perth Theatre. Council's intention is for these facilities 'to be the focus for creating one of Europe's most dynamic and successful small cities by 2010'.<sup>21</sup>

Although Perth and Kinross Council is a small local authority with the accident of two legitimate theatres within its boundary, this is not uncommon. Neighbouring Fife Council supports the Adam Smith Theatre in Kirkcaldy, the Carnegie Hall in Dunfermline, the Rothes Halls in Glenrothes and the Byre Theatre, St Andrews. In Perthshire, superficially, one theatre opens in the summer and the other produces in the autumn and winter. It might therefore be supposed that amalgamation is a tidy solution. Thus, the local authority has, like the Scottish Arts Council, adjured the two companies to

Investigate the benefits of a closer working relationship [as] a condition of the Service Agreement. [The companies are to] liaise and explore areas of common interest and action to maximise the efficiency and effectiveness of the service and to promote the best use of the resources available to both companies. These areas of cooperation should be clearly defined in the yearly application for funding.<sup>22</sup>

The surprise is that despite such attractiveness in theory, few successful instances of cooperation by theatres elsewhere can be found. A wide disparity exists between cooperative rhetoric and cooperation's record. Indeed, the subject is not new for Pitlochry Festival Theatre; some Pitlochry governors may recall that the former Tayside Regional Council contrived to merge Dundee Rep, Perth Theatre and Pitlochry Festival Theatre, but the scheme was stillborn: the managements went ape-shit and local government reform cast it to one side. In 1984, the Festival Theatre dealt with an Orwellian Scottish Arts Council investigation undertaken by independent management consultants Urwick Orr. This mooted 117 egregious ways of consolidating *nine* producing theatres' administrations. The companies' response was, largely, channelled through the Federation of Scottish Theatre, who claimed that the recommendations were predetermined by the SAC Drama Department. After eighteen months' patient negotiation, the Federation of Scottish Theatre's desired result of continuing self-administration with artistic autonomy and clarity was eventually accepted.

Cooperation or merger is immensely difficult to implement and sustain.

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<sup>20</sup> <http://www.pkc.gov.uk/aboutpk/factsfigures.pdf>

<sup>21</sup> <http://www.pkc.gov.uk/leisure/perth2000/index.htm>

<sup>22</sup> Perth and Kinross Council, *Service Agreement 1 April 2002-31 March 2004, Provision of Services to Perth Repertory Theatre Limited*, [and service specification attached], Perth, Perth and Kinross Council, May 2002, p. 17.

At Pitlochry, the play choices might historically have been from a similar oeuvre to Perth – especially under the earlier managements of Kenneth Ireland and Joan Knight – and hence it might be easy to suggest that there is duplication between the theatres, even though they are 27 miles apart. In fact, the theatres have become markedly different to each other in recent years. One is a festival theatre, retaining its distinctiveness through seasonality, location, repertoire, ensemble and a tourist audience, whilst the other has been encouraged to pursue a mixed-programme of visiting productions across all performing art forms; at Perth, this programming has rapidly taken root, with the addition of greater education and community use. The purposes are dissimilar; with this new theatrical diversity in Perthshire, merger would no longer be the amalgamation of like-minded and reconcilable artistic visions, even if it complied with the expectations of the funding bodies who tend quickly to assume that it would reduce duplication and overlap and cut down on overheads.

The two theatres are now also markedly unlike in their financial income profiles and their proportionate allocations to artistic expenditure. In 2001, for instance, when Pitlochry earned 78 per cent of turnover from earned income, the Perth Theatre ratio was only 54 per cent of turnover. Even though the total operating income of the two theatres was virtually identical last year (Pitlochry £1,628,134 and Perth £1,627,704), their priorities are incongruent; Pitlochry spent 56 per cent of expenditure on production activities, whereas Perth's equivalent was only 40 per cent on production costs and artists. Conversely, where Pitlochry has kept management costs down (at £735,981), Perth Theatre demonstrates an emphasis on management culture (at £928,817).<sup>23</sup>

Nevertheless, the subject is more complex; because it means different things to different people and because of the grant conditions, the following commentary is offered. Firstly, it is best to clarify certain definitions of the forms of possible Pitlochry-Perth association.

<b>Partnership</b>	All forms of association with Perth Theatre (and/or Perth Concert Hall), including merger
<b>Merger</b>	The combination of Pitlochry Festival Society Limited and Perth Repertory Theatre Limited into one limited company; Perthshire Theatres Trust Limited
<b>Takeover</b>	An amalgamation in which either Pitlochry or Perth is assimilated into the other
<b>Merger of equals</b>	A merger in which neither theatre (nor the new Perth concert hall) is expected to dominate

From discussions with Pitlochry staffs and the Scottish Arts Council head of drama, it is clear that there is a wide spectrum of partnership options, most of which are not mutually exclusive. It is possible for the two theatres to have different forms of

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<sup>23</sup> For more comparisons, see 'Income and Expenditure: 8 theatres 1999-2000', in Erica King and Matthew Rooke, *SAC Review of Theatres*, Glasgow, Scottish Cultural Enterprise Ltd, 2001, Appendix A, Digest of Statistics, p.28, or Bonnar Keenlyside, *Perth and Pitlochry Theatres: Joint Activities Business Plan*, [Draft 1], Burntisland, Bonnar Keenlyside, July 2002, pp.10 and 12.



partnerships, starting and finishing at different times. There are advantages and disadvantages to all the options. However, even the easiest require investment to bring returns. The options which offer the greatest apparent strategic benefits involve growth, have the highest costs, may be permanent, are more likely to involve conflict, and have a longer timescale for an uncertain return on the 'investment' of staff time, as well as lots more consultancies. Even the benefits of the seemingly appropriate options will vary between the two theatres and within each theatre over time.

The overriding issues are often described as means to achieve economies of scale and greater efficiency. For Pitlochry, these considerations should be important only to the extent that they can help the Festival Theatre achieve greater effectiveness. Economy and efficiency are appropriate motivators for a commercial business, which has to provide financial returns to shareholders and investors, but the charitable and artistic objectives of the Pitlochry Festival Society were not set up on this basis. The funding bodies may be concerned about supposed duplication and overlap within Perthshire, but this is not necessarily the primary concern for the Festival Theatre. The crucial question about merger, partnership and cooperation for Pitlochry is whether it will help achieve its artistic vision.

A range of seven options is identified here, together with some of their advantages and disadvantages, in order that the Board of Governors may discuss its preferred strategy to feed into the new 'advancement' plan and artistic policy:

## **1. NO PARTNERSHIP WITH PERTH THEATRE**

### **Potential Advantages**

- Retain autonomy to pursue and develop Pitlochry's distinctive artistic policies
- No organisational and staff upheaval and insecurity
- No risk of being pulled in another artistic direction by Perth
- Enables new artistic leadership to find feet

### **Potential Disadvantages**

- Retain all current problems
- Risk – unless great care is taken – of this being seen by SAC and PKC as unhealthy rather than a purposeful option
- If this option is taken only because it is the easy option, Pitlochry may be heading for a showdown with the funding bodies
- Pitlochry cannot be "pulled forwards" by Perth and Kinross Council

## **2. LIMITED LINKS WITH PERTH THEATRE**

For example: informal networking; regular contacts between managers; staff visits; participating in joint Perthshire-wide marketing initiatives; educational theatre forums; joint-advertising accounts with media suppliers for modest discounts; two theatres could be interlocked through informalities of one or more governor-board member overlap appointments.

## 2. LIMITED LINKS WITH PERTH THEATRE

### Potential Advantages

- Retain and strengthen autonomy and control
- No organisational upheaval
- Able to get on with dealing with big problems of Garden and capital debts on theatre refurbishment, without risk of being pulled in another direction or backwards by Perth Theatre's problems and future construction of Concert Hall
- Benefit of non-threatening, two-way information sharing and learning from limited links with Perth Theatre
- Might contribute to personnel and organisational development
- Might provide valuable external networking for Chief Executive and management team
- Can be a limited, flexible, open-ended, low-level commitment
- There is an element of partnership which may be attractive to the funding bodies

### Potential Disadvantages

- Retains many elements the status quo
- Could involve a significant time investment for individuals for little organisational gain
- Links could break-down if it is perceived that one theatre is benefiting at the expense of the other; links might be lop-sided after opening of Perth Concert Hall
- Conflicts of interest for an individual who wears two hats as governor of two Perthshire theatres which are or become competitors
- There may be no clear focus on a task which has an end-point, in which case the investment may continue when it ceases to be good value
- May be hard to identify tangible benefits
- Management and control may be problematic and over-dependent on chief executive's personal/negotiating skills
- Managers might easily spend too much time on networking, leading to inattention to main tasks at Pitlochry

## 3. LIMITED RESOURCE SHARING BETWEEN PITLOCHRY AND PERTH

For example; sharing box-office facility; sharing marketing function; sharing information about, say, service standards or benchmarking practice

### Potential Advantages

- Retain autonomy
- Limited organisational upheaval

### Potential Disadvantages

- Inability to capitalise on current Pitlochry 'festival' identity
- Resource sharing involves set-up costs, including preparation of detailed proposals and probably new box-office equipment; box-

### 3. LIMITED RESOURCE SHARING BETWEEN PITLOCHRY AND PERTH

- Partner theatre in Perth need not be competitor because of distance
- The partnership would conciliate the funding bodies
- office function includes customer care at Pitlochry: diluted if handled in anonymous and remote phone room
- Pitlochry personnel dedicated to theatre's familial atmosphere and motivated by distinct artistic policy
- Difficulty of ascertaining true costs or savings of shared resources
- Might constrain fundraising efforts, with risk of being pulled in other direction or backwards by Perth Theatre
- May be serious consequences if the arrangements do not work as well as expected
- May be serious consequences if Perth Theatre terminates arrangement or went into liquidation

### 4. MORE RESOURCE SHARING BETWEEN PITLOCHRY AND PERTH

A more formal partnership formed by Pitlochry Festival Theatre and Perth Theatre to secure staff and services jointly which Pitlochry might not afford or retain individually. This could involve the appointment of a joint artistic director and a joint chief executive; the sharing of the production workshop with Perth (but located at Pitlochry); the provision for other shared staff such as a marketing manager or personnel manager. Other resources might be accessed outside Pitlochry on a shared risks/costs basis (such as training; merchandise; web-site development; on-line bookings; distance theatre learning; education programmes; commercial touring circuit and foreign touring exploitation; other income generation). These would need a formal agreement and could involve the setting up of a new jointly controlled enterprises company.

#### Potential Advantages

as for limited resource sharing [above], plus:

- If pooling resources reduces pressure for full amalgamation, might sustain aspects of the diversity of Pitlochry Festival Theatre

#### Potential Disadvantages

as for limited resource sharing [above], plus:

- There are significant development costs, which represent high risks during time of big deficit (Disadvantage would be reduced if Pitlochry waits until sophisticated Perth Concert Hall develops such services; Pitlochry might invest in them rather than set them up)

#### **4. MORE RESOURCE SHARING BETWEEN PITLOCHRY AND PERTH**

- Might enable Pitlochry to attract staff of higher calibre
- The scale of the management would make it inherently more stable and resilient in the event of key staff leaving
- Might give Pitlochry a greater degree of control than in other schemes involving 'rational management' fixations
- Might lead to loss of dedicated, accomplished but low-paid staffs
- Probably cost more than current arrangements in the short-term
- Increases reinvention of the wheel
- New joint-leadership would need high salaries; creating bad pay differentials with existing staffs
- Production workshop might be better utilised in short 'down-time' by small-scale touring companies or building for the Scottish national theatre

#### **5. JOINT PROJECTS OR PROGRAMMES WITH PERTH THEATRE**

This option involves developing and agreeing plans with Perth Theatre, obtaining funding, sharing certain operational responsibilities such as the staging of co-productions and new product development. Other purposes might include knowledge sharing, market access, joint purchasing projects for goods and services; for example IT support, research, buying-in visiting productions for performing in both theatres. Joint venture testing might ascertain practicality of merger in later years, which might be prudent to do now, but before Perth Concert Hall is built – merger would be premature during that new venue's detailed planning, fundraising and construction phase.

##### **Potential Advantages**

- Retain autonomy and capitalise on current identity
- No major organisational upheaval
- Joint purchasing schemes might achieve some economies of scale without merger

##### **Potential Disadvantages**

- Joint projects could have substantial set-up and management costs
- Not as efficient as running a project in-house; considerable time and effort needed; would need to attend innumerable meetings, read papers, test assumptions based on no experience, drafting endless reports, chief executive frequently away from Pitlochry for networking business
- Project funding is always time limited and prone to chopping and changing in grantor enthusiasms

## 5. JOINT PROJECTS OR PROGRAMMES WITH PERTH THEATRE

- Facilitates the development of larger scale without all the costs or risks falling on one theatre organisation
- Opportunity for staff learning and development
- Partnership would be perceived as attractive by funding bodies, especially as it seems easier to obtain project funding than core funding
- Could offer a way to expand without a merger
- Co-operation on joint projects and programmes can develop mutual trust and respect between Pitlochry and Perth, providing the starting point for a closer relationship between the theatres. A joint project could be used to explore the compatibility of partners in advance of merger
- High degree of dependency on Perth Theatre required
- Visiting attractions shared with Perth dilute programming distinctiveness and create unnecessary competition for audiences in overlap catchments
- There could be serious consequences for management if the arrangements do not work as well as expected
- Joint purchasing schemes could offer better value if organised Scotland-wide by Federation of Scottish Theatre
- Co-productions with Perth Theatre could be beside the mark; for artistic reasons they should be with impresarios and theatres in more distant locales; try Dublin, Ontario, Douglas, Melbourne &c – or, for sake of SAC Drama Strategy, co-productions with Scottish ‘research and development’ companies; or, for money, the Scottish national theatre<sup>24</sup>

## 6. MERGER BETWEEN PITLOCHRY AND PERTH THEATRES

This option is a total combination of Pitlochry Festival Society Limited and Perth Repertory Theatre Limited into one new company, styled ‘Perthshire Theatres Trust’ by Bonnar Keenlyside. At Pitlochry, this would require the consent of the members of the limited company (who are greater in number than the Board of Governors). Another company, Perth and Kinross Leisure Limited, is the putative client for construction of Perth Concert Hall and, when that venue is complete, it would hand over operational functions to Perthshire Theatres Trust. The freehold of Pitlochry Festival Theatre would be transferred to the new company or to Perth and Kinross Council. Merger is a high-stakes, high-risk, medium term strategy, requiring careful planning and management. The gains in terms of effectiveness and efficiency in the medium to long term must outweigh the short-term costs and risks.

In this ‘rational management’ process, a merger would have greater potential than

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<sup>24</sup> Scottish Arts Council, *Strategy for Drama 2002-2007*, Edinburgh, Scottish Arts, Council, January 2002, p.6.

## 6. MERGER BETWEEN PITLOCHRY AND PERTH THEATRES

the preceding forms of partnership. It would involve the absolute fusion of the two Perthshire theatres, with all their resources and competencies. It might therefore achieve more than partial combination. It could help achieve long-term strategic goals more quickly and open up new opportunities. Other positive outcomes might be getting out of rigid beliefs and ways of managing, greater external recognition by the Scottish Arts Council and, perhaps, higher local authority subsidy levels after the initial integration period. By merging, a more powerful force would be created to better deal with the arts funding system. The new company would be governed a new board (that might or might not comprise members of the two existing boards). The new company could be managed by a new artistic director, in partnership with either of the existing chief executives (styled 'general manager' at Perth Theatre today) or by recruiting a new chief executive habituated in the management of repertory *and* touring theatres. [See discussion on leadership and the styles required].

Theatres, like all organisations, can be viewed as having life cycles. Unless Pitlochry Festival Theatre renews itself, it may die. In mergers, newness and change management excite the funding bodies, without setting the clock back as if the merged organisation is very new, and without the higher prospect of failure of totally new organisations, as would be the case if the new Perth Concert Hall were operated under stand-alone management.

Pre- and post-merger work has significant costs in terms of time, energy and money. Arts administrators do well; theatre makers recede. Resources and energies are diverted from the normalities of play producing; the Festival Theatre's chief executive would be diverted from her other, demanding activities. Other development work (such as The Garden) may be delayed or divested. There will be ways in which the cultures of the two theatres will differ, and attention will have to be given to identifying these differences to achieve proper integration. The substantial additional workload both before and immediately after merger diverts intellectual resources from the real activities of the theatre.

The work on the merger might be fruitless, because technically speaking the Perth Theatre could withdraw right up to the last moment. While some benefit to both theatres from having worked on the issues would remain, this would probably not outweigh the investment.

### Potential Advantages

- For managers, positive outcomes may include greater job satisfaction, status, promotion, prospects, pay, and job security
- Merger may be the best or the only way Pitlochry Festival Theatre can survive
- Overheads might be spread over a larger administrative base

### Potential Disadvantages

- Theatre makers and artists are unlikely to remain at the nerve centre of Pitlochry Festival Theatre; the sway of administration over production increases
- Merger would nullify artistic autonomy
- Merger would involve a significant decrease in efficiency in the short term; it should be viewed as a medium to long term

## 6. MERGER BETWEEN PITLOCHRY AND PERTH THEATRES

- Through change of theatre ownership to Perth and Kinross Council, the council's influence might become a controlling one; with political dominance, the Festival Theatre might be less likely to be closed down
- Greater stability to weather problems
- If the merger is managed well, the new non-profit charitable company is in a better position to cope with further growth or other change management, whether incremental or another merger or acquisition in the Perthshire cultural industries: it could takeover, or merge with, the George Inn Lane Arts Centre, Fair Maid's House, the Perth Festival of the Arts, the Perth Museum and Art Gallery, the AK Bell Library, ice rinks, bandstands and other recreational amenities
- Merger may offer the greatest likelihood of the benefits of partnership outweighing the costs/disadvantages
- Merger costs might absorb the entirety of the Scottish Arts Council "Advancement" grant, leading to necessity of another Lottery application for other change management identified in consultants' reports
- If staffs and artists do not want to remain in the merged theatre organisation, there might be high turnover of personnel and consequential high replacement costs
- The merger might create a stronger theatrical management but not increase the range of services offered to the public
- Merger might reduce 'healthy competition'
- Merger might weaken the sinews of self-help at Pitlochry; the most self-supporting producing theatre in Scotland would come to regard the politics of subsidy as more important than artistic direction. theatre making and selling
- Merger might reduce the artistic diversity of the two theatres and undermine the unique festival ideal at Pitlochry
- There is an element of the strategy

## **6. MERGER BETWEEN PITLOCHRY AND PERTH THEATRES**

“death” of both former organisations; handling public relations will be sensitive; long-serving patrons – and the members of the limited company – may be indignant; press coverage may be negative; relations with the theatre industry peers may be negative

- Staffs are likely to be concerned about the increase in distance from the top to the front line of the new organisation and becoming smaller cogs in the wheel
- There may be redundancies; TUPE legislation will be difficult to navigate; trades unions may be uproarious
- Merger would involve significant extra workload and travel-time between theatres, especially for the chief executive-and-executive producer, and would be extremely stressful for everyone

## **7. BENEFICIAL OR UNWHOLESOME TAKEOVER BY PERTH THEATRE (AND PERTH CONCERT HALL)**

This would involve the assimilation of Pitlochry by Perth – the financially weaker (debt laden and self-owned theatre) theatre by a stronger one (because it owned by the local authority and, when the Concert Hall is built, will be a much larger organisation). Unlike the private sector, this should not be confused with a hostile acquisition by Perth purely for the gain of the larger organisation. The object when non-profit charitable companies combine is still public benefit. However, the term “takeover” still has negative connotations and is, therefore, often loosely labelled a “merger”.

A takeover would involve major change management for the weaker partner (Pitlochry). It would also involve major change for the stronger partner (Perth), depending on how it sees its own future artistic policy as a diluted mixed producing and receiving house and concert hall.

Assimilation by Perth might be more straightforward and likely to be perceived as more successful than a merger of equals. This is because Perth holds more managerial and financial power and its ‘culture’ would dominate – especially with the prospect of the Concert Hall, driven as that is by the local authority and not by the organic growth and public demand that established Pitlochry. Pitlochry would have to accept more compromises in order to secure better financial arrangements for the future. An evaporation of artistic purpose and identity at Pitlochry would ensue.



## 7. BENEFICIAL OR UNWHOLESOME TAKEOVER BY PERTH THEATRE (AND PERTH CONCERT HALL)

Potential advantages and disadvantages additional to those for a merger (see above) are:

### Potential Advantages

- Provision of a larger scale of theatre delivery; with wider range of ancillary programmes and services and choice, without all the risks falling onto Pitlochry alone
- Helps achieve economies of scale and critical mass
- Synergy may be generated
- Creates a stronger organisation, providing administration for development of more/better services in future
- Assimilation of Pitlochry into Perth may offer only way to survive; may be the only alternative to closure

### Potential Disadvantages

- Risks the loss of all aspects of the values and culture of Pitlochry Festival Theatre built-up over 51 years
- Would not reduce duplication: (because of geographical distance and seasonality, duplication is a mistakenly invalid argument)
- Pitlochry, as weaker partner, has less control over the future than if it remains separate, assuming it would be viable alone

### *4.2 The ordeal of centralised management: selecting the appropriate options*

All relationships between theatres involve giving something up and expecting something back in return. They all carry some degree of risk. One is not inherently better than another is. It is possible to have different forms of partnerships with Perth Theatre, starting and finishing at different times. What makes one option the best choice for Pitlochry at this time depends on many factors – internal and external. The form of the partnership will be affected by:

- What it is that Pitlochry wishes to address through the partnership.
- Specific considerations relating to the nature of the artistic policy of the company.
- If Perth and Kinross Council's supposed threat to the revenue grant provides the impetus, the actual amount of their desired annual 'saving'.
- The pace at which change is desired.
- How much the funding bodies are prepared to invest in partnership, in terms of cash, time, energy, and diversion of resources from other arts activities; and whether this sum will exceed the "advancement" grant for change management and implementation

- What risks the Pitlochry governors are prepared to take and how important they regard the 'festival ideal' as an artistic attribute and marketing tool.
- The crisis of deficit and the interregnum of temporary leadership at Pitlochry in 2002-03. This makes some action urgent and makes it easier to contemplate the option of surrendering autonomy and handing over the entire freehold and company to Perth and Kinross Council to manage as it sees fit.

If, instead of these factors, the 'driver' is a Scottish Arts Council focus on monolithic, insipid or homogeneous theatre management, or even Perth and Kinross Council's needing to shift resources to subsidise the inevitable high running costs of a new concert hall, or a desire of both funding bodies to achieve other economies of scale so as to pursue 'new initiatives', or because they are cock-eyed in thinking that partnership will reduce duplication of administrative effort, then the Pitlochry governors risk failing to identify the option most appropriate to its corporate objectives of public benefit and new visions of artistic success.

#### *4.3 Some structural prototypes and lessons learned from their implementation*

Examples of other mergers and affiliations between theatre companies offer the governors models for discussion and guidance. One form that this takes is the fusion of a repertory theatre with a touring house, which is analogous to management of Pitlochry and Perth Theatres being implanted in the Perth Concert Hall under the mooted Perthshire Theatres Trust. Ultimately, the differing outlooks of a producing and receiving theatre - incarnate in the discordant interests of many artistic directors and managers today, if not in their boards of directors - means that the systems have almost never cooperated well in any city. The arrangements in Sheffield and Northampton are a blueprint.

At Sheffield in 1990, the rehabilitation of the Lyceum Theatre as a No.1 touring house prompted the formation of two non-profit trusts under one chief executive, and the redundancies of a long-serving Crucible Theatre artistic director and general manager. From 1992, these two non-profit companies amalgamated fully as Sheffield Theatres Limited, since when the analgesics have seen out four more artistic directors; only since 1998 has the combination prospered artistically and financially. At Northampton, the Sheffield experience served as a map for a full-merger of the non-profit repertory company at the Royal Theatre with that of the council-managed but adjacent Derngate Theatre, creating Northampton Theatres Trust in 2000. As with the theatres in Sheffield, the scheme led to considerable media unrest, as well as the departure of an accomplished artistic director and general manager from the repertory company, made redundant in favour of a new chief executive brought in from a touring house and the arrival of a new 'artistic producer' who resigned in under one year. Then, in 2002, a new artistic director of the in-house productions was appointed (who will also influence the toured-in programme) and the chief executive was dismissed amidst rumours of spiralling debts. Like Sheffield, it is taking a long-time to implement successfully.

Despite the usually bewildering turnover of leadership and subsequent incoherence in the artistic policies of the producing partner, the long-wait for success in mergers between repertory and touring is not always as chaotic as these experiences. The case of the affiliation between the Royal Lyceum Theatre Company and the King's

Theatre, Edinburgh (under Edinburgh Civic Theatre Trust Limited between 1974 and 1977) was successful under Clive Perry. The Pitlochry governors might wish to discuss the lessons learned from his Edinburgh experience; local government reorganisation intervened to de-merge these theatres' overarching management.<sup>25</sup> Excluding the precedents of 'repertory-and-receiving' – which in the case of Perthshire would also include the potential misfit of a *concert* hall – I turn to rep-and-rep. It was observed that the once-venerable Perth Theatre has been significantly shorn of its production output of late and that, unlike Pitlochry, the once-shared traits of ensemble are no more. Soon, its artistic director will depart (as at Pitlochry, Michael Winter was beseeched to extend his contract); Perth Theatre is therefore in a similar state of artistic indeterminacy, and has been for two years. The coincidence is anybody's guess of course, but the two theatres might be seen to be ripened for merger now that their current artistic leadership is on the way out. At Liverpool in 1999, following the liquidation of Liverpool Repertory Theatre at The Playhouse and the meltdown of the more radical and enquiring Everyman Theatre, a new non-profit company was established, led by an executive producer with a team of associate directors. Here, the jury is still out – but the customary upheaval in personnel continues: an embarrassing turnover of staff persists. It would be rewarding for the Pitlochry governors if the chairman and management team could visit Liverpool to learn first hand (rather than from consultants) the tribulations, financial savings and creative breakthroughs of this merger implementation.

Nearer to home, the example of the enforced, higher-profile, costly and drawn out amalgamation of Scottish Opera and Scottish Ballet between 1997 and 2000 is well aimed for comparability. In stark contrast to good management practice, £2.5million subsidy was spent on merger handling; there was to be a fusion of all non-

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<sup>25</sup> These examples of mergers exclude the *residency* that a repertory theatre might have with a touring house, where the functions of theatre management and theatre producing are separated, as when the Meadow Players Limited was closely associated with the Oxford Playhouse from 1956 to 1971, Candida Plays Limited with the Theatre Royal, Bury St Edmunds from 1965 or Cambridge Theatre Company Limited's association with the Arts Theatre of Cambridge from 1970. However, these companies (that are no more), kept their organisational distance as separate legal entities with their own staffs. In each instance, the repertory company and the theatre espoused, at the outset, the centralising of certain management, production and marketing functions, but perhaps because the theatres promote other attractions that compete with seasons of the 'resident' company – and negotiate over rent and standing charges – the parties often come to see themselves as competitors and are hung-up about the sharing of services. Options for separating the functions of a theatre *building* from those of a theatre *company* would seem to be contrary to the resident repertory ethos of both Pitlochry and Perth Theatre 'companies'.

These examples also exclude the merger of the Festival Theatre (non-profit trust) and King's Theatre (directly managed council theatre) at Edinburgh between 1997 and 1999. Here, the fusion was between two touring houses after destructive head-to-head competition for securing suitable attractions. This amalgamation – that might be cited in some quarters as a precedent for Perthshire – is in fact dissimilar. It was a sensible commercial response to dealing with producers who played one theatre off against the other, as they also did by competing with a third, (syndicated) Edinburgh touring house, the Playhouse. Nevertheless, although this merger intended to ameliorate the problems of finding and contracting shows, it has not yet led to a combined reduction in the two theatres' deficits and grant needs; in 2002, the new company, Festival City Theatres Trust, is treating with the funding bodies and the Scottish Executive for extra subsidy.

performing functions. None of this succeeded: boards were dismissed, the companies' performance schedules withered. The two limited companies continue to limp along, albeit with a shared board and one chief executive; it was a humiliating failure for the Scottish Arts Council and the lessons should be remembered.

From the discussion above, there are clearly different perspectives on the concepts of cooperation with Perth: different consultants and practitioners advocate a diverse array of models to help the two theatres become more successful (in whatever way 'success' is defined). What the Pitlochry Board of Governors and the funding bodies need to know, however, is whether of any of it will actually work. Appropriate evidence for the success of theatres that have adopted any of the options and models advocated above is in short supply. Mostly, these gallant efforts at reform are abject failures.

## **5. THE PROMISE OF COOPERATION WITH OTHERS**

### *5.1 The prospects and constraints of partnerships and co-productions*

One of the desired outcomes of the *Scottish Arts Council Drama Strategy* is 'an integrated, collaborative, theatre sector'.<sup>26</sup> For Pitlochry, this objective – which has resurfaced often in my review – might be served through the artistic benefit derived from another sphere of collaboration: that of co-productions. At other theatres, this has been one response to a headlong decline in the number of in-house productions, although at Pitlochry, the reduction from six to five plays may not be considered as proportionately large as elsewhere. The system of co-productions would require a far more entrepreneurial outlook for Pitlochry management. Co-productions might have considerable appeal for new plays, musical theatre, and technically difficult productions. For a smaller partner-company, the concept represents an opportunity to create new shows with the support and expertise of an established, 'wealthier' theatre, which they might not create independently, not having as technically proficient a production team as Pitlochry. For Pitlochry, these opportunities might be innovating, but the great difficulty is to mount a co-production within the repertoire and ensemble system.

For other companies, co-productions have also been exchanges of established plays in arrangements that are more nominal with companies of similar size, for instance Dundee Rep and the Royal Lyceum Theatre, the Tron Theatre and the Traverse, or a Scottish theatre with an English theatre (for example, the Royal Lyceum with Derby Playhouse and Salisbury Playhouse). The system has been to share the rehearsal and production expenditure with the partner company, including the fees paid to creative teams of director, set, costume and lighting designers. Two theatres become equal partners to create productions with larger casts, which neither company could otherwise afford. In the circumstances, these schemes are financially responsible and a short-term means of minimising the risk by reducing the amortised production costs over the respective seasons. Further, by reducing the average costs per performance for both companies, some pressure for higher subsidy is taken off the Scottish Arts Council, although there are inevitably extra costs of managing them,

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<sup>26</sup> Scottish Arts Council, *Strategy for Drama 2002-2007*, op.cit, p.6.

which must be estimated separately. Occasionally, these co-productions might also be vindicated for enabling an extra week of rehearsal and, perhaps, a higher performance standard. However, at Pitlochry, co-productions represent a complex planning and negotiating challenge within the ensemble system; I recommend that the subject be deferred until the new artistic leadership is settled.

In the longer-term, should the company investigate these partnerships, co-productions might follow the engagement of prominent guest directors from potential partner theatres; for instance, 2002 guest directors Patrick Sandford (artistic director of the Nuffield Theatre, Southampton) or Richard Baron (now associate director at Nottingham Playhouse) might discuss with the artistic leadership the feasibility of their companies working with Pitlochry. One of the plays at Pitlochry could transfer to, for example, Nottingham Playhouse in November. Likewise, it is conceivable that a production could be presented at, say, Southampton in March and then come to Pitlochry, the advantage being that the Festival Theatre could open more productions in less time. I understand that Clive Perry has indeed held tentative discussions with other theatres, but that these foundered on the other theatres' inability to align themselves with the longer-range Pitlochry planning cycle. Better still, Pitlochry might prepare the ground with the reanimations of a foreign guest director from another summer theatre, such as from the Shaw Festival Company at Niagara-on-the-Lake or another Ontario theatre.<sup>27</sup> At any rate, a co-production with a theatre outwith Scotland might have superior impact and new synergy, so that in return for the effort, Pitlochry derives a greater kudos than from a comparatively insular preoccupation of resembling the practices of other Scottish building-based theatre companies; international cultural exchange and dialogue would be bettered.

In turn, the artistic leadership might use its contacts with the commercial and festival circuits, to manoeuvre amongst independent producers for exploitation on the No 1 or No 2 touring circuits; they have a voracious appetite for new productions, but these are always sold on the back of established 'names'. Nevertheless, here too the coordination required to integrate leading players into the season might often skew the programming away from its organic progress. Looked at from the perspective of the Pitlochry ensemble, there is a clear danger here of "the tail wagging the dog". The Festival Theatre must play to its strengths.

## *5.2 Pitlochry Festival Theatre and the expectations for a Scottish national theatre*

Howsoever the Scottish national theatre is organised within its challenging new 'producing' model, the Festival Theatre may contribute as one of the new organisation's producing companies. This may be rotated between all or some other theatre companies, but will probably occur by invitation of the national theatre.

Productions will need somewhere to rehearse (by rotation) and a scenic and costume workshop to manufacture the décor and technology. Implementation awaits the

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<sup>27</sup> As one example, the long-serving British-born artistic director of the Shaw Festival, Christopher Newton, retires this year. Praised as a leading interpreter of Edwardian theatre, he has frequently been a guest director at theatres in Australia and Ireland and might be encouraged to be a guest director at Pitlochry.

appointment of their 'creative producer and chief executive' (before the end of 2002) and production staffs, whereupon specific plans will come into focus. The Festival Theatre might negotiate to offer the production fabrications, beginning in late-2003-into-2004, if Elaine Kyle, the Pitlochry production manager, can wedge this into the Pitlochry production cycle.

The Scottish national theatre will be looking for a clerical location, comprising at least three offices. There is probably no room at the Festival Theatre to house their administration, but Pitlochry should canvas the possibility of the town becoming their administrative base, in other premises. The off-season availability of the full-Festival Theatre stage for rehearsals and a 'production week' culminating in one public dress rehearsal is a more conducive attraction to the new company. At all events, the advent of this new company next year is a well-timed opportunity for the Festival Theatre artistic leadership to influence the outfit for mutual benefit.

### ***5.3 Pitlochry Festival Theatre as administrative umbrella for a 'research and development' company***

Another way in which the Festival Theatre might share in the responsibility for the health of the Scottish theatre as a whole – and meet a key *Scottish Arts Council Drama Strategy* objective – is to affiliate with a smaller and uninitiated touring company, with a smaller organisation than the Scottish national theatre.

The best example of this practice is the Royal Lyceum Theatre Company's provision of basic management and co-ordination services to Communicado Theatre (between 1986 and 1994); this was well conceived, making the smaller organisation lean and, at the same time, improving the image of the Royal Lyceum by hosting a 'research and development' company. It gave Communicado access to engagements at the Royal Lyceum Theatre, other large theatres and on the festival circuit, as well as a production workshop, accounting and marketing expertise. This enabled expansion at a time when it would have been laborious and costly for the younger, imaginative company to grow independently. This collaboration worked well because it was evolutionary, with the senior artistic director welcoming Gerry Mulgrew as an associate director of the parent theatre. The affiliation included collaborations on reviving and expanding the renowned Communicado productions of *Cyrano de Bergerac* and *Thérèse Raquin*. Eventually, the return of Communicado to independence probably followed a natural organisational life cycle for the sheltered company: its liquidation in 1999 is a separate matter.

At Pitlochry, this kind of partnership might, like the Scottish national theatre, be attractive because of the 'off-season' stage availability for rehearsal and production week; indeed, when measured against the strain of the mooted affiliations with Perth, it could work much better because it is neither the product of local authority enforcement nor Scottish Arts Council strategy. Hence, the identification of such a company – if it is not to be the Scottish national theatre – should be a priority enquiry for the next artistic leadership, but must depend on that. Potential companies could be cited, but the cutting-edge scene is fluid and an obvious mismatch would be best avoided.

#### ***5.4 Pitlochry Festival Theatre and a 'social inclusion partnership'***

A new grant condition this year is the requirement to formulate 'a social inclusion partnership'. In north Perthshire, rural deprivation may be as important as urban poverty is in Perth [see Perth and Kinross Council policy for social inclusion, in appendix 6.1]. During consultations, staffs were emphatic that patrons go the Festival Theatre to be uplifted, educated and diverted from their daily woes. They do not attend this theatre in order to be entertained by national political agendas. Rather, this subject concerns the Festival Theatre role in the community, about how it can be more involved in the local and countywide residential population. The objective is to increase the staffs awareness of and commitment to new services. There may a strong latent interest in the Festival Theatre amongst north Perthshire residents, but it would be wrong to presume these needs and attitudes. A project should develop at its own pace; theatres are accustomed to making things happen fast, whereas community organisations tend to operate at a more organic pace. A Festival Theatre member of staff should be designated the task of consulting and listening to other groups, perhaps facilitated by the Theatre Chaplain. Simultaneously, the Festival Theatre should discuss the subject with the local authority arts team, to identify groups (that might be elsewhere in the county), make initial contacts and contribute to the local authority's social exclusion projects. The purpose would be to begin a facilitation of access that might investigate the potential of a Festival Theatre project.

## **6. APPENDICES**

### **6.1 EXHIBIT: Perth and Kinross Council Social Inclusion Policy**

Perth & Kinross Council is committed to ensuring that all services are accessible for all sectors of the community. In so doing, the council recognise that some people may be excluded from taking part in society. People can feel excluded if they have no direct access to services, or are unable to have a say in the way that the area is run or have special needs for accommodation or support services such as people who have problems associated with age, disability or health. Exclusion can have many causes. Examples are discrimination and prejudice, unsafe communities, geographical isolation or caring responsibility and disability.

Social Inclusion is concerned with identifying where and how exclusion is happening and overcoming barriers to inclusion. To promote social inclusion the Council will ensure that citizen's rights and responsibilities are central to all of its activities and those of its partners.

An inclusive community is one where people:  
Are able to participate in community life  
Have influence over decisions affecting them  
Are able to take responsibility for their communities  
Have right of access to appropriate information and support  
Have equal access to services and facilities.

The Council thinks that social inclusion should cover the following areas:

Increased participation in the labour market  
Tackling poverty  
Ensuring that every child entering primary school is ready to learn and make the best use of their school years  
Reducing, if possible to zero, the number of children who leave school unqualified and ill equipped to cope with life  
Widen participation in, and the demand for, lifelong learning  
Tackling specific barriers to participation individuals face including ill health, low self esteem, homelessness  
Elimination of discrimination and inequality on the grounds of gender, race, disability, age and sexual orientation  
Reducing inequalities in health  
Ensuring that reasonable and affordable housing is available to all  
Tackling inequalities between communities by empowering and regenerating disadvantaged communities  
Supporting and encouraging the contribution of business for the well being of communities  
Promoting a culture of active citizenship in which self development, participation in community and civic life and caring of disadvantaged neighbours are key features  
Examining access to services in rural areas  
Developing community safety



## 6.1 Persons Consulted

<b>Anderson, John</b>	Catering Manager
<b>Appleby, Pete</b>	Technical Manager
<b>Axford, Nikki</b>	Chief Executive and Executive Producer
<b>Baron, Richard</b>	Guest Director
<b>Barron, Charles</b>	Marketing Manager
<b>Billington, Karen-Ann</b>	Stage Manager
<b>Boswell, Lorne</b>	Secretary, Scottish Equity, Glasgow
<b>Brettle, Jessica</b>	Wardrobe Supervisor
<b>Cardew, Julius</b>	Assistant Theatre Manager
<b>Dawson, Nick</b>	Project Manager, Scottish Plant Collectors' Garden
<b>Freer, Jo</b>	Actor
<b>Grieve, Ian</b>	Director of Productions
<b>Hallewell, Gordon</b>	Governor
<b>Harrison, Miles</b>	Advancement Manager, Scottish Arts Council
<b>James, Martyn</b>	Actor [written submission, 20 June 2002]
<b>Johnston, Gavin</b>	Stage Manager
<b>Kennedy, Derek</b>	Finance Manager
<b>Kyle, Elaine</b>	Production Manager
<b>Lee, Dougal</b>	Actor
<b>Liddell, Colin</b>	Company Secretary and Governor
<b>Logan, Helen</b>	Actor
<b>MacIntosh, Peter</b>	I.T. Manager
<b>Mackenzie, Sarah</b>	Business Development Manager
<b>Ogilvie, Susan</b>	Assistant Catering Manager
<b>Oliver, Cordelia</b>	Drama critic and Festival Theatre historian
<b>Perry, Clive, OBE</b>	Festival Director
<b>Pighills, David</b>	Chairman of the Board of Governors
<b>Pirnie, Margaret</b>	Theatre Manager
<b>Pritchard, Mark</b>	Lighting Designer
<b>Rees, Adrian</b>	Guest Designer
<b>Ross, Colin</b>	Law and Dunbar-Nasmith, Festival Theatre architects
<b>Sanderson, Helen</b>	Assistant Box Office Manager
<b>Sandford, Patrick</b>	Guest Director, 2002
<b>Sutton, Roger</b>	Master Carpenter
<b>Taylor, David</b>	Head of Drama, Scottish Arts Council
<b>Thorne, Danielle</b>	Head Scenic Artist
<b>Treadwell, Moray</b>	Actor

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