



ALBA | CHRUTHACHAIL

TOURING FUND FOR THEATRE AND DANCE

FUNDING GUIDELINES 2024/25



Updated July 2024

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Alternative Formats, Languages and Access Support

Creative Scotland is committed to offering clear and accessible application processes that are open to everyone. We have several ways of supporting you in making an application.

Alternative Formats and Languages

Our published materials, including funding guidance and application forms, are provided in alternative formats and languages. On request, they can be made available in other formats, as required.

We can accept applications and supporting materials which are written in English, Gaelic or Scots.

Access Support

Access support contributes to costs for services to help applicants overcome barriers to applying for our funds.

We offer access support to individuals or the lead applicant of a group who self-identify as d/Deaf, hard of hearing, disabled or living with chronic illness, mental illness or neurodivergence, such as dyslexia, autism or ADHD.

Visit our website to learn more about the types of support you can request, how and when to request assistance and, how to request access costs as part of your funding application:

[Access Support | Creative Scotland](#).

If you are a d/Deaf BSL user, you can access our services with the Contact Scotland-BSL programme.

Visit www.contactscotland-bsl.org for more information.

Contacting our Enquiries Service

If you require technical support, further information or have any other queries, contact our Enquiries Service by email or through our website.

Email: enquiries@creativescotland.com

Website: Fill out a [form on our website](#)

We aim to respond to all enquiries promptly. If you want us to call you back, give us your number and we'll arrange to come back to you as soon as possible.

The Touring Fund for Theatre and Dance

What is the fund for?

The Touring Fund for Theatre and Dance was an outcome of a review of Touring for Theatre and Dance published in 2017.

The purpose of the Fund is to support touring of high-quality theatre and dance (including outdoor, circus, interdisciplinary and site-specific work). This can include remounts of previously successful shows, shows which have previously undergone research and development, and tourable work yet to be produced. The goal is to support a range of work of different scales to tour throughout Scotland, and to help the touring sector engage with and develop audiences. The fund also aims to support work created by a diverse range of artists, companies and producers, and for a diverse range of audiences.

We expect applicants to demonstrate ambition in the number of venues/locations they intend to tour and have a clear rationale for the selection of these, whilst recognising the venue limitations of certain artforms and genres.

Productions that will be presented at only one or two locations may be eligible for support through [Creative Scotland's National Lottery Open Fund for Organisations](#).

Award rounds were made in [July 2022](#), [December 2022](#) and [December 2023](#).

This fund is supported by The National Lottery through Creative Scotland.

Who can apply?

All applicants must be based in Scotland and involved in the production and/or touring of live theatre and dance.

We will accept applications from:

- Individual dance and theatre artists, companies and organisations.
- Independent dance and theatre producers on their own, to create an individual piece of work or on behalf of artists.
- Consortia of venues for a shared programme of named touring work. These can include venues which are Regularly Funded Organisations (RFO's) and are funded to receive touring productions – provided they can demonstrate that this consortium activity is additional to their core work, that they are providing significant benefit to the consortium and that the majority of consortium venues are not RFO's. The lead applicant cannot be an RFO.

Who cannot apply?

- Applicants seeking funding to research and develop projects to an early stage of production*
- Applicants seeking funding to create work for presentation in schools*
- Applicants seeking funding to create work for online/digital dissemination*
- Applicants seeking funding to create/present work that has no live performance*
- Applicants seeking funding to create digital versions of the work*
- Applicants seeking funding to present work at the Edinburgh Festival Fringe or Edinburgh International Festival. Due to the high demand on the Touring Fund for Theatre and Dance, we are unable to support performances of your project at the Edinburgh Festival Fringe or Edinburgh International Festival. You may still carry out Fringe performances in addition to your tour, but none of the costs or income for these should be included in the budget for your application.
- Applicants seeking to create work that will not be touring*
- Applicants seeking funding for touring work in a medium other than theatre or dance*
- Creative Scotland Regularly Funded Organisations whose funding agreement includes making and touring theatre and/or dance as part of their core activity
- Student and non-professional companies
- Applicants seeking funding for touring activity outside Scotland*
- Applicants who are not based in Scotland.

* Please note: these types of projects may be eligible to apply to the Open Fund. Organisations who are not based in Scotland can apply to the National Lottery Open Fund for Organisations to tour to venues in Scotland; individuals who are not based in Scotland cannot apply to the Open Fund for Individuals to tour to venues in Scotland.

Budget

The overall budget for this round of the Touring Fund for Theatre and Dance is £2,000,000.

How much can I apply for?

There are no upper or lower limits on the amount an applicant can apply for. We expect to make awards across a range of values. Applications will be awarded the full request required to produce and tour the work. Reduced award offers will not be made.

How many applications can I submit?

- Artists/companies can submit up to two separate applications for two separate productions.
- Artists/companies/producers can submit one application for a production that is likely to earn a significant proportion of income from box office.
- Producers can submit up to three separate applications for three different artists/companies.

OR

- Producers can submit up to two separate applications for two separate productions by the same artist/company and another separate application for a different artist/company.

OR

- Consortia of venues can submit one application for a programme of touring shows.

When should the funded touring activity take place?

We are primarily looking to support activity taking place from Spring 2025 onwards.

We anticipate a further round of the Touring Fund for Theatre and Dance in 2025.

What is the timeline for the fund?

- Online application portal opens 2pm, Tuesday 9 July 2024
- Application deadline 2pm, Wednesday 18 September 2024
- Decisions sent to applicants week commencing 25 November 2024
- Touring activity to take place from Spring 2025

Assessment Criteria

Applications will be assessed against the following criteria:

- Artistic quality and ambition
- Potential for audience engagement and/or development and diversification
- How you intend to present your project
- Your approach to Equalities, Diversity and Inclusion within your project
- Your approach to Environmental Sustainability in your project
- Rationale for the proposal against recommendations of the Theatre and Dance Touring review
- Management plans
- Financial plans and value for public funding (i.e. through effective planning and budgeting, high quality work and audience experience).

More information on Creative Scotland's Funding Criteria is **available in Appendix One**.

The decision-making panel will select tours against these outcomes, that collectively ensure a balance of different types of work are represented.

Recommendations from the Review of Touring Theatre and Dance pertinent to this fund

All applicants to this fund are asked to carefully consider how their project will help deliver some of the key recommendations from the Review of Touring Theatre and Dance. Note that a project does not necessarily need to address all the key recommendations. A project that helps to deliver one of the recommendations strongly will meet this criterion sufficiently.

These recommendations highlighted the following needs:

- To improve reach and distribution.
- To address the gaps in distribution in the central corridor of Local Authority areas, and in the least visited areas.
- To trial and share innovative marketing and sustainable audience development approaches, which encourage repeat visits and longer stays, and include a focus on depth of engagement and local impact.
- To ensure proven high-quality work is given an extended life to reach more audiences. (Note that this is work that has been taken to full production for public presentation previously).
- To examine ways to pool resources to generate work with a longer life and more resources through consortia.
- To support the development of work that is locally or regionally situated and has increased capacity to resonate with audiences and communities.

What stages of work can be supported?

The fund will support the making and touring costs of live theatre and dance in Scotland:

Making and Touring

Work that has previously undertaken research and development and requires support to complete the work before touring.

New Work that is Tour-Ready

Work that has completed its production and is ready to tour. The work may have been presented as a preview or premiere or had a short run to establish programming interest.

Restaging or Remounting Previously Successful Work

Work that has already toured and can secure more touring opportunities.

For tours that include larger scale venues and are likely to earn a significant amount of income from box office, **please see Appendix Two**.

Venue Selection

We expect applicants to demonstrate ambition in the number of venues/locations to which they intend to tour, with a clear rationale for the selection of these.

FST Code of Practice for Touring Artists/Companies/Producers

To be eligible to programme work supported through this fund, venues and promoters are part of a cohort who have agreed to abide by the revised Federation of Scottish Theatre (FST) Code of Practice. This is an agreement to follow best practice when working with artists supported through the Touring Fund for Theatre and Dance.

It covers communication protocols, who is responsible for which elements of marketing and audience development and supports mutually beneficial relationships to deliver against the aims of the Touring Fund for Theatre and Dance.

Successful applicants are expected to plan their tours by selecting venues from the Touring Fund for Theatre and Dance venue cohort. Venues and promoters are welcome to join the cohort on an ongoing basis and must have joined before booking your show. Details on how venues can join, and the list of current venues, is available on the [Creative Scotland website](#).

FST Code of Practice for Consortia

All partner venues are expected to have signed up to the FST Code of Practice.

Outdoor Work/Work in Non-Conventional Settings

If your tour is in outdoor sites or non-conventional settings, you do not have to draw your host sites/venues from the touring fund venue cohort, although they can be included. For example, a host site/venue could be managed by a non-arts organisation. We would still expect you and the site manager to use the FST Code of Practice.

How to apply

All applications to the Touring Fund for Theatre and Dance must be made through Creative Scotland's [online application portal](#).

For information on how to register, access and complete the application form, visit: my.creativescotland.com/user-guide.

To register an account, visit: my.creativescotland.com/signup.

If you are already registered, log in to the portal at my.creativescotland.com/login

To access the application portal, visit: my.creativescotland.com

1. Once logged in, select the **Touring Fund for Theatre and Dance** application form.
2. Click on '**Apply Now**' to begin your application and complete the form as instructed.
3. You can **save your application** and return to it at any time before the deadline of 2pm, Wednesday 18 September.
4. If you need access support during the application, click on the '**Access Support**' button. This will inform the support team of your requirements and you will be contacted as soon as possible.
5. **Submit the completed form before the deadline.** Once submitted it will not be possible to amend the application so ensure you thoroughly review and check before submission.

To help you prepare, you can preview the **application questions in Appendix Three and Four** of this document. You can also use the 'Review your Progress' button after you have completed the registration and begun the application process.

In your application you must include

- A clear proposal outlining the creative idea and the creative team. Applicants should be able to demonstrate their track record in the delivery of creative projects.
- A detailed budget (see more information in the **Budget Information** section along with the supporting **budget template** available alongside this guidance on the [Creative Scotland website](#)).
- **A risk assessment form** using the template available alongside this guidance on the [Creative Scotland website](#).
- **For artists/companies/producers:**
 - An indicative outline of venues/spaces/host locations or geographical areas you intend the work to be performed in and your rationale for selecting these. In order to reduce the work preparing an application you do not need to have come to any agreement with these venues or promoters at the point of submitting your funding application.
 - Please do not submit any programming notes of interest from venues and promoters as we will not take them into consideration. You may wish to include industry and/or audience feedback from previous presentations or showcases.
- **For consortia:**
 - A description of the artists/companies you intend to work with and your rationale for selecting them.
 - A description of your venue partners.
- Information on who will be responsible for managing the project and what experience they demonstrate in the unique operational and logistical challenges of touring.

Impact of COVID-19 on your touring projects

Since March 2020, COVID has been an issue for organisations to manage. Your project may be disproportionately affected depending on your activity – for example if you are working with people who are clinically vulnerable. Hence COVID should be considered by all applicants within the risk assessment.

Do you need advice before applying?

If you would like to discuss your project with Creative Scotland before applying, please contact the Enquiries Service.

Application, assessment and decision-making process

Stage 1: Receipt of application

Shortly after submitting your application, we will send you a confirmation message confirming receipt and giving you with a reference number. If you do not receive this automated email please check your spam filters, junk files and deleted items. If there is still no sign, get in touch with us at enquiries@creativescotland.com as soon as possible to check that we have received your application.

Stage 2: Eligibility Checking and Assessments

All eligible applications will be assessed by Creative Scotland staff. Assessments will be made on the information you provide in your application and supporting materials, including your financial information, online information available on your organisation, and the assessor's knowledge of your organisation. Please note that assessors might find that an application is not eligible during their initial review. If this is the case, we will email you and let you know. We will also explain why your application is not eligible. The assessor will make a recommendation on whether your application is assessed as 'recommended for funding' or 'not recommended for funding'. Some specific conditions of award may be also recommended at this point.

Stage 3: Decision making

Decisions will be made by a panel of up to four Creative Scotland staff plus five panel members drawn from the touring theatre and dance sector, recruited by an open call process and selected by Creative Scotland. Membership of the panel will be for set periods and new members will be recruited regularly.

The panel will decide on a balanced selection of projects in terms of artform genres, production scales and scales of venues/host sites.

All panel members will receive training on panel decision making which will include unconscious bias training. Where a panel member has an interest in an application this should be declared. It will not be possible for a panel member to sit on a panel where they are also an applicant (either as an individual, company, producer or as part of a touring network/consortium). Decisions will be made within ten weeks of application.

Stage 4: After decisions are made

Applications awarded funding:

We will let you know by email whether you have been awarded funding. If you have been successful, this email will tell you what to do next. We will issue you with a contract and ask you to return a signed copy of this contract. Your contract will include standard conditions of award and may include some special conditions. We will also ask you to confirm your bank details. Your bank/building society account must be in the name of the organisation or individual that is applying for a grant. If you apply as an individual, we will only make payments to your individual bank account.

If you apply as an organisation, we will only make payments to a bank account in the organisation's name.

Successful applications will be awarded funding in principle for the project in its entirety. This funding will be released to the applicant as follows:

If your application is successful, you will be expected to identify all tour venues/host locations and broker conversations with them to book the tour. This work will be financially supported by the first instalment payable on signature of the funding agreement.

You will be expected to develop an audience development and engagement plan, in collaboration with the venues you tour to, using the tour planning spreadsheet and the updated FST Code of Practice as a basis. This will ensure you and your proposed venue partners are clear on what you expect each other to provide in order to get an audience for your production.

Applications not awarded funding:

We will let you know the outcome of your application by email. We will tell you why your application was not awarded funding and provide feedback. You can request a copy of the assessment of your project to help you understand how well it met the criteria for the fund and if further information is desired, a follow up meeting with Creative Scotland can be arranged.

Resubmissions

If an application is not awarded funding, then you can re-apply. We will accept an application for touring of the same work up to a maximum of four submissions. This is based on the work/tour itself, not based on who is submitting it.

Freedom of Information (FOI)

Creative Scotland is committed to being as open as possible. We believe that the public has a right to know how we spend public funds and how we make our funding decisions. For more information, visit the Freedom of Information section of our website:

[Freedom of Information | Creative Scotland](#)

We are listed as a public authority under the Freedom of Information Act (Scotland) 2002. By law, we may have to provide your application documents and information about our assessment to any member of the public who asks to see them under the Freedom of Information (Scotland) Act 2002. We may not release those parts of the documents which are covered by one or more of the exemptions under the Act.

Please see the Freedom of Information website at www.itspublicknowledge.info for information about the Act generally and the exemptions. We will not release any information about applications during the assessment period, as this may interfere with the decision-making process.

Complaints

As an organisation, we will always listen to and respond to any concerns that you may have. If you would like to make a complaint about either the service you have received from Creative Scotland or the way we have handled your application, we have a process that you can use.

Please note that Creative Scotland does not have an appeals process and for this reason, we are unable to accept complaints that relate solely to the decision we have made rather than how we have made it. For more information, please visit the Complaints section of our website:

[Complaints Handling | Creative Scotland](#)

Data Protection

Creative Scotland requires some personal information about you/your organisation to consider your application for funding. Without this information we will be unable to process your application.

If you would like to see a breakdown of the personal information we require, why it is required, what we do with that information and how long we keep it, please refer to our Privacy Notice on our website: [Privacy Notice | Creative Scotland](#).

Creative Scotland may share your personal information with third parties to comply with the law and/or for our legitimate interests and/ or the third parties concerned. Where the personal information you have provided to Creative Scotland belongs to other individual(s), please refer to our Privacy Notice. Please ensure you share this Privacy Statement and Creative Scotland's Privacy Notice with the respective individual(s).

You have some rights in relation to the personal information that Creative Scotland holds about you under data protection law. Our Privacy Notice contains information on how to exercise these rights, or you can contact our [Data Protection Officer](#).

If you have any concerns with how we have processed your personal information, you should contact our Data Protection Officer in the first instance, as we would welcome the opportunity to work with you to resolve any complaint. If you are still dissatisfied, you can submit a complaint to the [Information Commissioners Office](#).

Subsidy Control

As a public body Creative Scotland must comply with the subsidy control rules in the Subsidy Control Act 2022 and Trade and Cooperation Agreement between the UK Government and the European Union. More information can be found at:

www.gov.uk/government/collections/subsidy-control-regime

Any award made through this fund will require the recipient to acknowledge that the grant comes from public funds and confirm that the support provided is compliant with the Subsidy Control rules.

Where applicable, the recipient must agree that Creative Scotland will publish information relating to the grant and that the recipient will keep reasonably detailed records to demonstrate compliance with the Subsidy Control rules and shall provide a copy of such records to Creative Scotland upon reasonable request. If it is deemed to be non-compliant with the Subsidy Control rules, the recipient may be required to repay the entire grant (and any other sums due) immediately.

Appendix One – Creative Scotland Funding Criteria and Additional Reference Documents

Creative Scotland Funding Criteria

[Funding Criteria | Creative Scotland](#)

EDI Reference Documents

Unlimited has some resources including one on Accessible and Inclusive Recruitment and Employment - [Resources - Unlimited \(weareunlimited.org.uk\)](#)

[Creating Your Own Access Rider \(weareunlimited.org.uk\)](#)

Environmental Sustainability Reference Documents

Creative Carbon Scotland Reference Documents

[Guide to measuring your travel | Creative Carbon Scotland](#)

[claimexpenses.com](#)

[Guide to writing a sustainable travel policy | Creative Carbon Scotland](#)

Quick Carbon Management Calculator [Carbon management tools and resources | Creative Carbon Scotland](#)

Case Study – Transforming Audience Travel Through Art [Transforming audience travel through art | Creative Carbon Scotland](#)

Zero Waste Scotland

[Circular Economy | Zero Waste Scotland](#)

Theatre Green Book (Vol 1 – Sustainable Productions)

[Theatre Green Book](#)

Appendix Two – Touring of work that is likely to earn a significant proportion of income from box office

Performances playing at larger scale venues (e.g. The Kings' Theatre/ Theatre Royal Glasgow, main auditorium Capital Theatres Edinburgh, His Majesty's Theatre Aberdeen, The Empire Theatre, Eden Court Inverness) have the potential to earn significant income. By 'significant' Creative Scotland means box office income which will be at least sufficient to support the weekly touring costs at these venues.

As The Touring Fund for Theatre and Dance is public funding from The National Lottery, it is not appropriate for this funding to subsidise any profits made from these performances. These venues' contracts for performances should be negotiated at the normal commercial deal appropriate for the work. The production's earned income from these dates should then be used to cover the weekly touring costs of the production to larger scale venues and to support the overall creation costs, if possible, of the production thus lessening the demand on public funds.

These tours could also include middle and small-scale venues. For these venues the offer would be an 80/20 split in the venue's favour. You can include the costs of touring to them in your budget and application to the Touring Fund for Theatre and Dance.

Artists/companies/producers' applications can include one application for a tour that is likely to earn a significant proportion of income from box office.

These applicants will still need to address all the other criteria of the fund, as laid out in the guidelines.

Appendix Three - Summary of Application Questions for Artists/Companies/Producers

Project/activity details

- Name of project/activity
- Provide the delivery start/end date of your touring project/programme
- Confirm the overall start/end date of your project (outwith the touring/delivery dates, i.e. including planning, evaluation, etc.)
- Summarise your project the way you would pitch it to venues/promoters for consideration for their programme, with audiences in mind. (approx. 50 words). *We will use this to assess the likelihood of your project developing audiences.*

Your touring project

- Tell us in further detail about the touring project you are seeking funding for. (approx. 1000 words). *What is the show about? What is your artistic vision and concept for the project? How will you achieve this? How would you describe the project's type of work? Who are the target audiences? If relevant, please describe the partners you will be working with (outwith venues) etc.*

What is your approach to Equalities, Diversity and Inclusion within this project? (approx. 300 words) i.e. The representation of diverse perspectives and themes, recruitment and casting, partner organisations, audiences. Please note that if there are EDI themes in your work this alone is not sufficient to meet this criterion. You can find links to **further information in Appendix One.**

- Does the budget include appropriate access costs and do these reflect the plans described in the application?
- Are inclusive and accessible recruitment and employment practices described?
- Will you use access riders?
- Are the themes of your work about EDI issues? (Note that this alone is not sufficient to meet this criterion)
- How has the accessibility of the final production and chosen venues been considered?

Explaining your touring format and choice of locations

- Tell us why you have chosen these venues/locations. (approx. 500 words) *Why would they want to programme your work? You do not need to have come to any agreement with the venues/promoters at the point of submitting your application. However, we do expect you to provide details of any relevant conversations, research or relationships which explain the rationale behind your proposed tour.*
- Explain your rationale for the number of venues/locations and/or the touring model you have chosen. How will this support you to achieve your ambitions for your project? (approx. 500 words) *Have you considered how to make your tour have maximum reach? Is the tour ambitious enough given the likely appeal of the show?*

What is your approach to environmental sustainability in the planning of your project? (approx. 300 words) Please note that if there are climate, environmental and biodiversity loss themes in your work this alone is not sufficient to meet this criterion. You can find links to further information in Appendix One.

- What are your plans to measure and/or reduce greenhouse gas emissions through the planning and delivery of your project?
- What is your approach to specifically reducing the impact of the emissions created by transport (including audience travel) within the planning and delivery of your project?
- How are you adapting your approach to tour planning to incorporate the impact of the changing climate?
- What is your approach to planning the circular design of your project to contribute to a circular economy? i.e. items are made and consumed in a way that minimises the use of resources, cuts waste and reduces carbon emissions. Items are repaired, recycled and redesigned.
- How have you considered climate justice within the delivery of your project?

Developing Audiences

- Provide a description of what will attract an audience to your project. (approx. 250 words)
- Tell us how your project will develop audiences for you and for the venues that you intend to perform at. (approx. 500 words) *How will you work collaboratively with the venues to achieve this? What will you include in your promoters' pack?*
- Describe how you intend to present your work (for example indoors in a regular theatre, in an indoor converted space, outdoors etc.) and why this suits your work best from both an artistic and audience perspective. (approx. 300 words) *Outdoor or non-conventionally staged projects have their own aesthetic and a different dynamic between performers and audiences than conventionally staged work. If relevant, demonstrate to us that you understand this and have relevant experience to deliver a high-quality audience experience.*
- If the work has been presented previously, tell us how audiences and venues responded. (approx. 200 words)

Artists involved

- Tell us more about the artists involved in the project. Supply brief biographies, demonstrating experience and track-record relevant to the proposed project. (approx. 500 words)

Addressing the recommendations of the Review of Touring Theatre and Dance in Scotland

These recommendations highlighted the following needs:

- To improve reach and distribution.
- To address the gaps in distribution in the central corridor of Local Authority areas, and in the least visited areas.
- To trial and share innovative marketing and sustainable audience development approaches, which encourage repeat visits and longer stays, and include a focus on depth of engagement and local impact.
- To ensure proven high-quality work is given an extended life to reach more audiences (note that this is work that has been taken to full production for public presentation previously)
- To examine ways to pool resources to generate work with a longer life and more resources through consortia.
- To support the development of work that is locally or regionally situated and has increased capacity to resonate with audiences and communities.

Explain which recommendations from the Review of Touring Theatre and Dance in Scotland your project addresses. (Please keep this answer brief – max. 200 words for each criterion.)

*You do not need to address all of these but only the most relevant to your project. Please note that not all projects are necessarily expected to meet all the recommendations. **A project that helps to deliver one of the recommendations strongly will meet this criterion sufficiently.***

Evaluation and Management

- Describe how your project will be managed and evaluated. (approx. 700 words) *Provide information about the management and production team/staff. Tell us if you have a producer in place or how you intend to secure one (if applicable). If you are one of the creative leads in the project and intend to self-produce, tell us how you will ensure that you can undertake both roles effectively.*
- *Tell us how you will ensure that your project will be tour ready at the point of starting to tour. By “tour ready” we mean that all aspects of its delivery have been planned for effective delivery. Given the particular operational demands of touring as opposed to other forms of presentation applicants need to demonstrate appropriate experience of the logistics and management of touring. This is particularly important if the production is new or has not toured previously. You may find our description of what an independent producer does is a useful resource to see what a producer’s role entails for your tour, see **Appendix Five for more information**. Please demonstrate that you have experience delivering a project of this scale and of managing public funds.*

- Provide a timeline for your project, i.e. dates and milestones for your planning, production and touring activity. (approx. 500 words) *Please include each milestone in the format: date/delivered activity.*

Budget

- Each application should be accompanied with a separate and detailed budget, which you should **upload within your application**. Please see the guidelines' Budget Information on what we need to see in your budget.
- Please also provide us with a breakdown of the overall costs associated with your project by completing the following two tables:
 - Budget Summary Table
 - Project Income Table

Supporting Material

Essential supporting material:

- Risk assessment – using CS template. (upload)
- If you are applying as an organisation, your Equalities and Diversity policy, or Equal Opportunities Policy.

Optional supporting material:

- Maximum 6 examples of past work.
- CVs of key project personnel.
- Access riders.

Budget Information

Project budgets should include the entire cost of making/restaging and touring the work. Although applicants are welcome to use their own format, a budget template can be found alongside this guidance.

Please submit your budget as an excel spreadsheet. Please do not use a PDF format.

Costs for the planning of the tour (i.e. tour booking, producer support, audience engagement planning) should be shown separately from the creation and making costs in your budget. If your application is successful, a payment schedule to cover these costs will be agreed with a first instalment payable on signing the agreement with Creative Scotland.

Rates of pay

Creative Scotland wants to ensure that people are paid fairly and appropriately for their time and effort. When you calculate artistic costs, please look at [Independent Theatre Council website here](#). Our [Rates of Pay Guidance](#) can help regarding other costs.

Please note: as part of the Scottish Government's Bute House Agreement, all organisations applying for funding from Creative Scotland from 1 July 2023 will be required to pay all of your directly employed staff at least the Real Living Wage.

Understudies

Costs for retaining understudies are not eligible for support. However, if a member of your company acts as an understudy and is required to work additional hours it is expected that they will be offered appropriate remuneration for those extra hours and that this would be met from the contingency.

Costs for rehearsing a pool of performers from which different performers will be selected for different performances are eligible for support. The selected performers would be paid per day of performance/travel. This may be an appropriate approach for tours with non-consecutive performances.

Royalties

If your project requires the payment of royalties to any participants e.g. the writer, choreographer, or author then these should be negotiated with the venues and taken from the gross box office takings before the calculation of the company/venue split. **These should not be included in the project budget.**

Access costs

Project access costs to support audiences/participants to engage with your production, personal access costs to support production personnel to undertake their roles.

Access to Work: You may also be eligible to apply for support from the UK Government's Access to Work fund, which can help cover some of the extra costs of carrying out your job, or travelling to, from and during work if you are disabled. More information on Access to Work is available here - www.gov.uk/access-to-work

Please note: Childcare costs are classed as a taxable benefit, so whilst Creative Scotland funding can cover these costs, you will be responsible for reporting this to HMRC.

Contingency

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Box Office fees should not be included in your budget. Instead, the successful applicants will be expected to offer the work to venues for no fee as all costs are covered by the fund. For any shows where box office is earned this should be divided on an 80/20 split in the venues' favour. The applicant should retain this 20% of the box office to support their ongoing work between projects. This may be used to maintain producer support or develop future projects. This must not be included in the project budget. Fees related to the creation of the funded project are covered by the funding award.

Theatre Tax Credit

We expect applicants to make full use of the Theatre Tax Credit but again this should not be included in the budget for the Touring Fund, although we will need you to record this in your end of project monitoring report. You should therefore make sure you have systems in place to capture the required information for a claim. Together with the 20% of box office we intend this to provide a level of sustainability for artists and companies between active touring projects.

FST Code of Practice

For venues, the retention of 80% of the box office is to support them to diversify their programmes, including programming types of work that they may not have previously presented and to develop and diversify audiences. To book this work venues will be expected to adhere to the Federation of Scottish Theatre (FST) Code of Practice as a basis, detailing what they will provide for the project, covering technical, marketing, staffing and how they will work with the applicant to deliver audiences. A copy of this can be found on the [Federation of Scottish Theatre website here](#).

Appendix Four - Summary of Application Questions for Consortia

Project/activity details

- Name of project/activity
- Provide the delivery start/end date of your touring project/programme
- Confirm the overall start/end date of your project (outwith the touring/delivery dates, i.e. including planning, evaluation)

Your touring programme

- Tell us in further detail about the touring programme you are seeking funding for. (approx. 1,500 words) *Describe the shows you intend to programme; who are the target audiences; why you have chosen to work with these artists/companies, etc. What are the shows about? What is your artistic vision and concept for the programme? How will you achieve this? How would you describe the programme's type of work? Who are the target audiences? If relevant, please describe the programme partners you will be working with (outwith venues), etc.*

What is your approach to equalities, diversity and inclusion within this project? (approx. 300 words) i.e. The representation of diverse perspectives and themes, recruitment and casting, partner organisations, audiences. Please note that if there are EDI themes in your work this alone is not sufficient to meet this criterion. You can find links to **further information in Appendix One.**

- Does the budget include appropriate access costs and do these reflect the plans described in the application?
- Are inclusive and accessible recruitment and employment practices described?
- Will you use access riders?
- Are the themes of your work about EDI issues? (Note that this alone is not sufficient to meet this criterion)
- How has the accessibility of the final productions and chosen venues been considered?

Your partner organisations

- Why have you chosen these partners? (approx. 200 words)
- Describe the roles and responsibilities of each partner organisation. (approx. 200 words)
- Tell us how the touring network/consortia will market the touring programme to build audiences and what benefits this will bring to each member. (approx. 300 words)

What is your approach to environmental sustainability in the planning of your project? (approx. 300 words) Please note that if there are climate, environmental and biodiversity loss themes in your work this alone is not sufficient to meet this criterion. You can find links to further information in Appendix One.

- What are your plans to measure and/or reduce greenhouse gas emissions through the planning and delivery of your project?
- What is your approach to specifically reducing the impact of the emissions created by transport (including audience travel) within the planning and delivery of your project?
- How are you adapting your approach to tour planning to incorporate the impact of the changing climate?
- What is your approach to planning the circular design of your project to contribute to a circular economy? I.e. items are made and consumed in a way that minimises the use of resources, cuts waste and reduces carbon emissions. Items are repaired, recycled and redesigned.
- How have you considered climate justice within the delivery of your project?
- Are the themes of the programme about environmental issues? Note that this alone is not sufficient to meet this criterion.

Developing Audiences

- Provide a description of what you will attract audiences to this project (approx. 250 words)
- Tell us how your project will develop audiences for you and your partner organisations (approx. 300 words)
- Describe how you intend to present the work (for example indoors in a regular theatre, in an indoor converted space, outdoors etc.) and why this suits your work best from both an artistic and audience perspective. (approx. 300 words). *Outdoor or non-conventionally staged projects have their own aesthetic and a different dynamic between performers and audiences than conventionally staged work. If relevant, demonstrate to us that you understand this and have relevant experience to deliver a high-quality audience experience.*
- If any of the work has been presented previously, tell us how audiences, venues responded. (approx. 200 words)

Artists Involved

- Tell us more about your proposed programme of work and about the artists involved. Provide brief biographies of the artists involved, demonstrating experience and track-record relevant to the proposed project. Clarify whether the partnerships with the artists/companies have been confirmed or at what stage they have reached. (approx. 700 words)

Addressing the recommendations of the Review of Touring Theatre and Dance in Scotland

These recommendations highlighted the following needs:

- To improve reach and distribution.
- To address the gaps in distribution in the central corridor of Local Authority areas, and in the least visited areas.
- To trial and share innovative marketing and sustainable audience development approaches, which encourage repeat visits and longer stays, and include a focus on depth of engagement and local impact.
- To ensure proven high-quality work is given extended life to each more audiences (note that this work that has been taken to full production for public presentation previously)
- To examine ways to pool resources to generate work with a longer life and more resources through consortia.
- To support the development of work that is locally or regionally situated and has increased capacity to resonate with audiences and communities.

Explain which recommendations from the Review of Touring Theatre and Dance in Scotland your project addresses. (Please keep this answer brief – max. 200 words for each criterion)

*You do not need to address all of these but only the most relevant to your project. Please note that not all projects are necessarily expected to meet all the recommendations. **A project that helps to deliver one of the recommendations strongly will meet this criterion sufficiently.***

Evaluation and Management

- Describe how your project will be managed and evaluated. (approx. 700 words) *Provide information about the management and production team/staff. Tell us if you have a producer in place or how you intend to secure one (if applicable). You may find our description of what an independent producer does is a useful resource to see what a producer's role entails for your programme, **see Appendix Five for more information.** Please demonstrate that you have experience delivering a project of this scale and of managing public funds.*
- Provide a timeline for your project, i.e. dates and milestones for your planning, production and touring activity. (approx. 500 words) *Include each milestone in the format: date/delivered activity.*

Budget

- Each application should be accompanied with a separate and detailed budget, which you should upload within your application. Please see the guidelines' Budget Information on what we need to see in your budget.
- Please also provide us with a breakdown of the overall costs associated with your project by completing the following two tables:
 - Budget Summary Table
 - Project Income Table

Supporting Material

Essential supporting material:

- Risk assessment – using CS template. (upload)
- Your organisation's Equalities and Diversity policy, or Equal Opportunities Policy. As lead applicant on behalf of a touring network or consortia of venues, only your own policy documents are required.

Optional supporting material:

- Maximum 6 examples of past work.
- CV's of key project personnel.
- Access riders

Budget Information

Project budgets should include the entire cost of making/restaging and touring the work. Although applicants are welcome to use their own format, a **budget template** can be found alongside this guidance on the [Creative Scotland website](#).

Please submit your budget as an excel spreadsheet. Please do not use a PDF format.

Costs for the planning of the tour (i.e. tour booking, producer support, audience engagement planning) should be shown separately in your budget from the creation and making costs. If your application is successful a payment schedule to cover these costs will be agreed with a first instalment payable on signing the agreement with Creative Scotland.

Rates of pay

Creative Scotland wants to ensure that people are paid fairly and appropriately for their time and effort. When you calculate artistic costs, please look at [Independent Theatre Council website here](#). Our [Rates of Pay Guidance](#) can help regarding other costs.

Please note: as part of the Scottish Government's Bute House Agreement, all organisations applying for funding from Creative Scotland from 1 July 2023 will be required to pay all of your directly employed staff at least the Real Living Wage.

Understudies

Costs for retaining understudies are not eligible for support. However, if a member of your company acts as an understudy and is required to work additional hours it is expected that they will be offered appropriate remuneration for those extra hours and that this would be met from the contingency.

Costs for rehearsing a pool of performers from which different performers will be selected for different performances are eligible for support. The selected performers would be paid per day of performance/travel. This may be an appropriate approach for tours with non-consecutive performances.

Royalties

If your project requires the payment of royalties to any participants e.g. the writer, choreographer, or author then these should be negotiated with the venues and taken from the gross box office takings before the calculation of the company/venue split. **These should not be included in the project budget.**

Access costs

Project access costs to support audiences/participants to engage with your production, personal access costs to support production personnel to undertake their roles.

Access to Work: You may also be eligible to apply for support from the UK Government's Access to Work fund, which can help cover some of the extra costs of carrying out your job, or travelling to, from and during work if you are disabled. More information on Access to Work is available here - www.gov.uk/access-to-work

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Appendix Five - Independent Producer

Indicative Job Description

Independent producers play a vital role in the theatre, dance, outdoor, circus and multi-artform sectors. Creative Scotland is undertaking research into the sustainability of independent producers' professional careers. As part of this research, we are responding to an identified need for clarity on the role of a producer from these sectors. We decided that a description would support understanding. We consulted with several established independent producers to create this. The following is an **indicative description** of what an independent producer's role encompasses, not a rigid definition.

Producing context

A producer is responsible for delivering a show, on time and in budget. The producer also typically defines what is 'on time' and 'in budget' for the show, as well as raising the money required to fund the production.

A producer works closely with an artist, collective or organisation to realise, deliver and report on a project or portfolio of work. A producer for theatre and dance may work across other artforms and carry specialist knowledge about particular forms and presentations styles. Producers can fulfil many roles and responsibilities and will provide specialist knowledge, adapting their expertise and style to work with a range of different people.

Producers have different financial models. A producer will set their fees based on experience and using industry union recommended rates, including ITC/Equity, SAU and BECTU, as a guideline. They may also be calculated dependent on the level of input required for each project.

In terms of the length of the engagement, they are usually first in and last out overseeing Research and Development, Production, Presentation, Showcase and Further Exploitation stages of projects. Producers' fees are typically paid in tranches, with the last one paid on completion of the project. Funders usually retain the last payment for a project until the final report is submitted. This means that the producer needs to wait until the payment is released to receive the final tranche of their fee, which can require a producer to manage complex cashflow issues.

Producer/Artist Relationships

Strong and effective relationships start with clear conversations about project needs in relation to the areas of expertise required, the level of involvement, the intended approaches to decision making, working styles and expectations for both parties. For example, some artists will look for a level of creative input, some purely administrative support; some artists will want to work collaboratively while others will want to keep oversight of the project and work alongside a producer to share workload. The producer and artist should have a mutually agreed understanding of which roles and responsibilities will be undertaken by whom.

Every producer's operating model is distinct, and this list of responsibilities is not exhaustive. Producers may react to approaches from artists or instigate projects. Producers may have ongoing relationships with artists, collectives, organisations or work on a project-to-project basis.

Indicative Independent Theatre and Dance Producer Description

Producing roles and responsibilities may include:

Producing

- Strategic development and implementation
- Meeting in advance of a funding application to realise a project plan and budget
- Programming the work
- Creative oversight and/or dramaturgical support, dependent on the relationship with artist
- Developing the ideas
- Identifying the key or lead creatives and wider creative team where appropriate
- Developing the model and/or overall project plan
- Securing IP/Copyright in the work / adaptation rights
- Developing opportunities for showcasing/bringing to market
- Business readiness: creating tour packs, documentation, sales assets for future exploitation
- Licensing the work
- Monitoring and safeguarding quality
- Line management of project personnel and/or acting as the main point of contact while not retaining line management responsibility
- Evaluation in line with funder requirements and to unpack the learning offered to project personnel
- Uncontracting/planning for when things go wrong/get cancelled

Management/Administration

- Project and General Management
 - Researching context, beneficiaries etc
 - Scheduling the work
 - Creating project timeline and milestones
 - Identifying team communication methods and scheduling regular team meetings
 - Identify project aims, objectives, impacts
 - Identifying project monitoring and evaluation methods and processes
 - Provide or source appropriate insurance

- Project Administration/Coordination
 - Booking travel and accommodation
 - Identifying suitable spaces
 - Filing
 - Responding to enquiries
 - Documentation

Finances

- Financial Management and Administration
 - Budgeting including setting fees/remuneration
 - Identifying credit controls
 - Managing cashflow
 - Identifying and delivery reporting process
 - Creative Tax Reliefs
 - Liaison with accountants
 - Administering payroll
 - Book-keeping
 - Processing invoices, making payments and record-keeping
 - Knowledge of statutory responsibilities
 - Holding funds within bank account
 - Managing sales reports from venues/tours
- Income generation:
 - Grants fundraising
 - Stewarding individual giving and regular giving
 - Developing sponsorship relationships, agreements
 - Agreeing terms around funder agreements
 - Acquittals/project reports to stakeholders

Communications, Audiences, Partnerships

- Venues and Partnerships:
 - Liaison with venues, programmers and promoters, partners
 - Agreeing partnership goals, shared aims and what a healthy partnership looks like
 - Negotiate and contract agreements with venues, co-producers, partners and manage these relationships
 - Issuing industry wide invitations (to sharings/previews/premieres) and follow up where artists have particular requests or interests
- Audience:
 - Identifying target market/audience groups
 - Marketing and Communications planning

- Marketing and PR or engaging and supporting Marketing and Press professionals including marketing coordinator, press and media liaison/PR, social media coordination, graphic designers, photographers and filmmakers
- Access provision: identify, coordinate and contract access offers Acting with care and consideration in terms of all communications
- Preparing, supporting or facilitating engagement/wraparound activity
- Co-ordinating audience/participant feedback
- Future Possibilities:
 - Facilitate creation of project documentation
 - Secure interest from national/international programmers
 - Represent/advocate for artists/show/sector at networking and industry events where appropriate
 - Horizon scanning for opportunities that might inform future work/ collaborations

Technical/Production

- Identifying production needs
- Engage and support production personnel
- Statutory health and safety responsibilities and licensing or delegating to trained/experienced Production Manager or equivalent
- Project/production risk assessments and mitigations

HR

- Managing recruitment, induction, training, appraisal and exit processes of project personnel using knowledge of relevant union terms and conditions
- Provide and manage access riders and access needs of project personnel
- Ensure best practice for Fair Work and Effective Voice, EDI and Environmental Sustainability
- Clear expectations and responsibilities of each role
- Professional development opportunities for project personnel
- Ensuring legislative compliance, safeguarding policies dealing with grievances and challenges and breaches of safeguarding for project personnel and audiences/participants
- Pastoral care - support mental health and wellbeing of project personnel and audiences/participants or arrange for a qualified person to do this – ensure expectations around this are clear
- Ensure project personnel are PVG checked where relevant



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