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**Leadership, risk and innovation in contemporary subsidised British
theatre: Cases from large-scale participation initiatives**

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Abstract

This interdisciplinary study explores large-scale participation initiatives within British subsidised professional theatre organisations (SPTOs) from a management perspective.

The academic literature on adult amateur and participatory theatre is sparse, despite the continually increasing public appetite for participation opportunities within the creative industries (Troilo, 2015; Brown et al, 2011). Added to this, the arts management literature does not cover the organisational challenges and opportunities of introducing ambitious new participatory work into subsidised theatres.

This thesis synthesises literature from arts management studies, organisation studies, leisure studies, and theatre and performance studies to build a framework of leadership, risk and innovation. These central themes are identified as a way to navigate the topic of the organisational perspective on large-scale participation in SPTOs, and as the principal areas where the study contributes to knowledge. Through privileged extended access to two of Britain's largest flagship theatres, the framework is applied to two large-scale 'Pro-Am' initiatives (Perry and Carnegie, 2013), in which professional and non-professional theatre-makers work together to create a theatrical event.

Using a qualitative case study approach, this study explores management practice and creative practice, offering context-specific knowledge which is relevant to scholars of social sciences and the arts.

Empirical data gathered through semi-structured interviews, participant observation, and document analysis shows the life-cycle of the case study initiatives, from conception of the idea to reaction to and assessment of the finished production, and develops understanding of the concept of Pro-Am theatre.

Large-scale Pro-Am initiatives can have profound effects on organisations, and the findings of the study are used to discuss the implications for arts management theory, and practice and cultural policy relating to participation in subsidised theatres.

The concept of 'keystone leadership' is proposed as an original contribution to the literature on arts leadership. It describes the attributes of leaders who introduce ambitious new initiatives into an organisation. The literature on managing risk in the theatre industry is extended by exploring how to identify and mitigate the risks of large-scale Pro-Am work. The study contributes to theory on innovation in the arts by looking at the two case study initiatives as a moment of rupture, with new models of theatre-making being developed.

There is a growing conversation on arts participation in the UK's scholarly agenda. Studies such as the AHRC's "Cultural Value Project" and "Connected Communities" programme, and the findings of the seminal report "Enriching Britain: Culture, Creativity and Growth" (Neelands et al, 2015), along with campaigns such as Arts Council England's "Creative People and Places", recognise and celebrate amateur creativity and the participatory arts. This timely study uses leadership, risk and innovation as a framework to think about participation from a management perspective.

This study also considers whether large-scale Pro-Am theatre initiatives within SPTOs can be viewed as an investment in the future of arts participation in Britain and proposes the 'participation ecology' as a frame for academics, policy-makers, arts leaders, practitioners, funders and participants to discuss the challenges and opportunities of different models of participation.

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(William Shakespeare).

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SPTO = Subsidised Professional Theatre Organisation.

DCMS = Department for Culture Media and Sport.

ACE = Arts Council England.

AHRC = Arts and Humanities Research Council.

NODA = National Operatic and Dramatic Association.

CTF = Charitable Trust and Foundation.

PGA = Professional Golfers Association.

1 Introduction

“Ladies and gentlemen, the theatre is on fire! Please exit the building.” Not a real emergency thankfully, just the end of act one. Within minutes, hundreds of audience members are ushered into the warm July evening. Out in the city centre, the cast of around 140 local, non-professional and 4 professional performers continue the production they began on the main stage of one of the UK’s biggest regional theatres. It is a bold political play and a theatrical spectacle, involving explosions and a tank.

During the same summer, on the main stage at the home of one of the most famous theatre organisations in the world, 13 amateur theatre groups showcase extracts of plays they have developed in collaboration with that celebrated organisation and have rehearsed in small local theatres, church halls and civic centres. One of the amateur groups is newly formed, with this their first production, another has been active for almost a century.

1.1 Rationale

Leading national and regional theatre organisations in the United Kingdom (UK¹) are increasingly incorporating productions involving large numbers of amateur participants into their artistic output, using a variety of different models. But why commit resources to this strategic direction? What are the benefits to the organisation and what are the risks? The purpose of this PhD research is to evaluate why and how building-based, publicly subsidised professional theatre organisations (SPTOs) develop ambitious new participation initiatives. It considers the internal tensions and external challenges faced by these unique ‘communities of practice’ (Heil and Whittaker, 2007; Wenger, 2000; Boland and Tenkasi, 1995) and explores the leadership and management practices at work. This study is a management inquiry at heart, but its soul lies in the theatre industry:

Theatre is the most directly human of art forms, creating a living record of our history and civilisation. It challenges, enlightens, entertains, and provokes thought, feeling and change in audiences and participants. It brings joy and explores human experience in ways factual material cannot. It engages our senses, feelings, will

¹ The geographic terms ‘UK’ and ‘Britain’ are used interchangeably in this thesis, as is the case in the literature, data and other resources consulted for the study. For example, one might speak of ‘British theatre’ and ‘The UK’s creative industries’.

and imagination as well as our intellects. It helps us to get our bearings in the world and understand ourselves and others and our place in society (Equity, 2011, p.5).

We have performed to each other since antiquity: "Throughout history, people have come together to make meaning of their lives through theatrical representation" (Graham and Foley, 2001, p.22). The words 'theatre', 'drama', 'comedy' and 'tragedy' are Greek in origin and there is evidence of theatrical performances and competitions dating back to 534 BC (Taplin, 1995). The Romans then introduced the concept of purpose-built performance venues to Britain and theatre has been a prevalent tradition within British society ever since. Theatre management is the arena for this study because of its complex processes and practices, my interest and expertise as the researcher, gained from twenty years working and studying within the dramatic arts, and theatre's status as a unique art form which is distinct from other types of artistic practice: "Theatre is a complicated pastime, bridging the fields of arts and leisure and the drivers of aesthetics, hedonics, emotions, education and entertainment, to name but a few" (Walmsley, 2011a, p.335).

This distinctiveness presents a compound set of managerial challenges for those creating and facilitating theatrical events. This is complicated even further by the often turbulent policy and funding environments of theatre organisations, and further still when these organisations expand their offerings by developing large-scale participation initiatives. The motivation for this qualitative study is therefore to understand the organisational implications of this strategic direction.

The impetus for the study came after I developed an interest in models of adult theatre participation within subsidised theatres. This was inspired by a feasibility study, conducted for an MSc qualification, into the introduction of an innovative large-scale 'people's theatre company' at an SPTO. My knowledge of theatre practice had led me to ask questions about the apparent sea-change in models of participation, such as how new large-scale initiatives are created, facilitated and received, what effects they have on organisations and what the cultural policy implications might be.

Having developed a passion for the subject of amateur theatre-makers within the professional space and the inherent challenges and opportunities for managers of participatory projects, I found that my interests were not satisfied within the current literature. It became clear that an original contribution to knowledge could be made, so I created the topic of the

organisational perspective on large-scale participation initiatives within subsidised professional theatres. Then, using my knowledge of the process of creating a theatrical production as a starting point, I read around the topic by considering all the stages in the process of creating such initiatives, from the conception of the idea through to assessing the project's success. What I looked for, but could not find, was literature that underpinned how and why ambitious participation initiatives are introduced into SPTOs. I refined the concept through the preliminary literature review process and the three central themes of leadership (the types of leaders who might take the strategic decision to instigate large-scale participatory work, and how this might fit with the organisation's mission and vision), risk (considering what makes such initiatives a risky undertaking, and how SPTOs might mitigate these risks) and innovation (how large-scale participatory projects might be creating new models of theatre-making) emerged as a way to navigate the topic and categorise the main scholarly arguments. These themes were also prominent and recurring terms within arts and theatre industry publications. The core themes were individually framed through the literature, then woven together to create the leadership, risk and innovation framework. I developed the central question and objectives and selected the case studies, then applied the framework as a lens to explore models of large-scale theatre participation within SPTOs.

1.2 Structuring the inquiry

The central question is: How are theatre organisations affected by large-scale participation initiatives? The unit of analysis (Lee, 1999) employed to address the central question is the 'Pro-Am' initiative, in which professionals and amateurs work collaboratively to create a theatrical event (Perry and Carnegie, 2013).

The central question frames the study because there is an exploration of Pro-Am as a complex construct within theatre management, given its defining attribute of providing a professional domain for non-professional performance. This empirical study offers fresh insight into contemporary theatre management practice by examining the internal organisational implications of SPTOs offering large-scale participation opportunities. This has been achieved through a qualitative exploration of the phenomenon. A comparative case study analysis of two Pro-Am initiatives was conducted, using data gathered from semi-structured interviews, observation sessions and documents. Thematic analysis was carried out and the interpreted findings reported.

1.3 Aim and objectives

Innovative Pro-Am theatre projects are happening across the UK. The aim of the study is to address the need for perceptive research on the inner workings of large-scale Pro-Am initiatives in SPTOs.

The objectives for the study are:

1. Understand how the concept of Pro-Am theatre is situated within current academic thinking and research agendas.
2. Identify prominent SPTOs with participation programmes and select the most multifaceted activity (large-scale Pro-Am initiative).
3. Explore the external policy and funding environments of SPTOs.
4. Discover how large-scale Pro-Am initiatives in SPTOs are structured, administered and led.
5. Investigate the internal managerial challenges and organisational implications of introducing large numbers of amateur participants into the professional domain of SPTOs; principally in terms of leadership, risk, and innovation.
6. Consider the potential implications for the future of large-scale Pro-Am work in SPTOs, and its place within the subsidised sector of the UK's theatre industry.

1.4 Contribution

This qualitative study contributes to knowledge through:

1. The development of arts management theory to make claims about;
 - a. Why SPTOs develop new large-scale participation initiatives, given the internal and external challenges, and the initiatives' potential benefits and legacy.
 - b. How these initiatives are created, considering the internal organisational implications.
2. A developed understanding and interrogation of the concept of Pro-Am theatre.

In addition to these theoretical contributions, this research can have a practical impact in terms of benchmarking best practice in large-scale Pro-Am theatre within SPTOs and documenting some of the key managerial and leadership challenges. A common declaration across the study's pilot interviews was that the theatre industry needs a piece of research collating some of the experiences, challenges and opportunities of these complex initiatives

to provide guidance on best practice, and inform cultural policy by expanding the research conversation on adult arts participation. The aim is to address this need with a perceptive study which will be of interest to practitioners as well as scholars. With little guidance for managers wishing to undertake such work, and an onus on individual artistic leadership, consideration is also given to whether large-scale Pro-Am projects should be a prerequisite for theatre organisations receiving public money.

1.5 Research domain

This PhD research is positioned in the realm of arts management, which is a subfield of management and organisational studies. The creative industries overall contributed over £87 billion to the UK economy in 2015 (Department for Culture, Media and Sport (DCMS), 2016). Within this, the contribution of the 'arts and cultural sector' (which includes theatre and other artistic and cultural activities) was £27 billion, a growth of 15% in 2014-15:

This makes it [arts and cultural sector] the fastest growing of any monitored by the DCMS, beating tourism (3.3%), sport (-1.5%) and the wider creative industries (7%) (Hutchinson, 2016).

The UK's theatre industry is globally renowned and is a "hugely sophisticated industry with highly developed mechanisms" (Cogo-Fawcett, 2003, p.5). Theatre is integral to public cultural policy objectives and offers numerous leisure opportunities.

Cogo-Fawcett (2003) defines the two main philosophical strands which motivate the creation of theatrical work and broadly divide the industry into two sectors:

Whilst both are primarily inspired by the desire to provide art and entertainment, one is motivated by pecuniary motives and by the desire to create profit and falls under the description of what we term 'the commercial theatre'. The other is founded more on the philanthropic principle that the primary purpose of art is to improve man's understanding of himself and his fellows (Cogo-Fawcett, 2003, p.7).

The study takes place within the second, 'subsidised' or 'non-profit' sector, which is widely acknowledged as "the bedrock for a thriving creative performing arts industry as a whole" (Equity, 2011, p.5), and represents a uniquely challenging environment for managers. The added complexities of receiving public money suggest that a subsidised organisation must not only produce a high quality artistic output, which engages audiences and generates revenue, but must also strive to meet cultural policy objectives and funding requirements (Conway and Whitelock, 2004).

The two case study initiatives, selected for their size and complexity, were both within SPTOs based in England (although some of the statistics and information given applied across the UK and one of the case study initiatives was a UK-wide project). This meant that both organisations operated within the same cultural policy remit of Arts Council England (ACE). From a practical perspective, selecting case studies in England also made the fieldwork more manageable in terms of travelling to the SPTOs.

As well as the literature review and primary data collection, my ideas were honed and the research informed by theatre industry publications and through attendance at industry and academic conferences addressing arts funding, public cultural policy, and amateur creativity. This also helped to ensure the objectives of the study remained current. The following figure shows how the study is positioned:

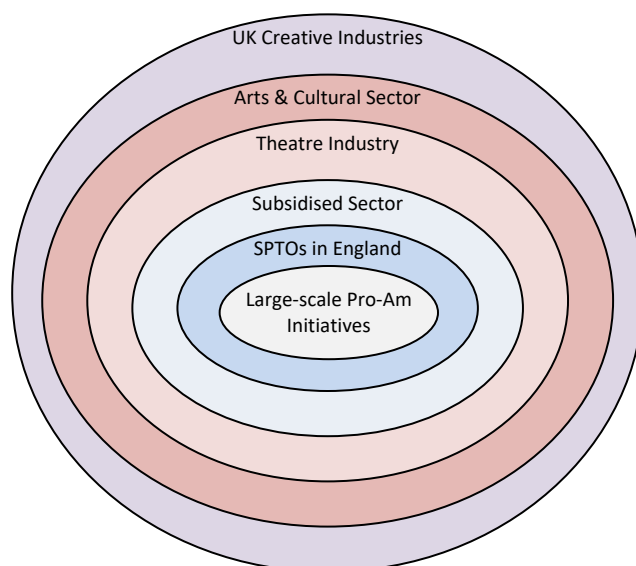


Figure 1: Positioning the study.

1.6 Parameters

This study's original contribution is an exploration of the organisational perspective on large-scale participation initiatives within SPTOs in England. Defining the contribution determines the boundaries of the study. It is not a sociological inquiry into why people perform or the benefits of arts participation, nor is it an economic impact study, but it does include relevant cultural and funding policies to explore how an SPTO reacts to the threats and opportunities of its external environment. The concept of the value of cultural experiences is linked to policy

and funding and so appears in the literature review, but cultural value is not a focal construct of the research.

The study concentrates on adult theatre participation initiatives, given the dearth of research in this area compared to youth theatre participation. One of the case studies is an intergenerational theatre company model, which includes participants aged twelve and upwards, but the focus is on the adult provision.

This is predominantly a study of initiatives involving those who are already participating and is not an inclusion study, although both case study initiatives did welcome participants with no theatrical experience. Pro-Am theatre is defined as amateur participants being invited and accepted into the professional space. This is a different form of arts participation from 'co-creation' (Brown, Novak-Leonard and Gilbride, 2011), although both can be used to describe collaboration between professional and non-professional theatre-makers in different contexts. Literature on co-creation focuses on the relationship between professional artists and audience members. Walmsley (2013a) states that although co-creation is a broad phenomenon within arts participation which defies a precise definition, it "attracts a highly niche audience of 'theatre people'" (p.108). The two case study Pro-Am initiatives involve some participants who have never visited the SPTOs as audience members and who have never acted before.

Leadbetter (2009) argues that there are many different forms of participation and collaboration. Brown et al (2011) also state that when it comes to arts participation, there is "an evolving lexicon of words and phrases that describe how people encounter and express their creative selves and share in the creativity of others" (p.5). I argue that co-creation is one such term, and Pro-Am theatre is another.

Although the central question explores the impact on SPTOs of large-scale Pro-Am initiatives, this is not an organisational change study. This large body of literature is usually concerned with viewing a whole organisation where something needs to change, which was not the context for either case study. The literature on organisational change also lacks the greater precision, dimensionality and relevance that the leadership, risk and innovation framework affords.

Seven participants were interviewed for the study's central narrative, with a view to achieving stakeholder coverage and understanding how the Pro-Am initiatives offered by the SPTOs were being received. However, the main focus of the study is the internal organisational environment, and the challenges and opportunities of creating large-scale participation projects which are outside the organisations' customary remit of staging professional productions.

1.7 Theoretical underpinning

The following section introduces the theory underpinning the concept of Pro-Am theatre. These arguments are drawn out and explored further in the literature review.

1.7.1 Why theatre?

Theatre is an intangible cultural product, created through a series of temporary systems (Goodman and Goodman, 1976). The complexities of creating the intangible theatrical process and product have been scrutinised from different perspectives (Fisher, Spear Purcell, and May, 2009; Carlson, 1988). However, the specifics of the large-scale Pro-Am theatre process and product remain under-researched, highlighting this study's contribution.

1.7.2 Timeliness: pertinent research agendas

Public engagement in the arts is being increasingly recognised by the academy. The Arts and Humanities Research Council's (AHRC) Cultural Value Project seeks to "establish a framework that will advance the way in which we talk about the value of cultural engagement and the methods by which we evaluate that value" (AHRC, 2015a). The AHRC is also leading the "Connected Communities Programme" in association with four other research councils and more than eighty research organisations. The vision for the programme is "to mobilise the potential for increasingly inter-connected, culturally diverse, communities to enhance participation, prosperity, sustainability, health and well-being by better connecting research, stakeholders, and communities" (AHRC, 2015b, p.1). A (July 2013-January 2017). The study is exploring amateur theatre participation as lived social practice, and is delving into the embedded archive of the stories and anecdotes of amateur theatrical experience held by the participants. It considers how amateur creativity may be marginal within the creative and cultural industries, yet has contributed to building the cultural assets we use every day. The research team intend to "bring our findings to the attention of those who have widely ignored

amateur theatre-makers in the past, including professional theatre, cultural policy-makers and academics” (Amateur Drama Research, 2015, p.4).

So it is evident that amateur arts participation is being recognised and discussed theoretically. However, this is seemingly the first academic study to explore large-scale theatre participation initiatives within SPTOs from an organisational perspective. It therefore contributes to the contemporary scholarly conversation on arts participation.

1.8 Literature streams

This inquiry adopts an interdisciplinary approach (Suddaby, Hardy and Huy, 2011). A theoretical framework has been created by synthesising key arguments relating to Pro-Am theatre from a range of disciplines: arts management and arts marketing (because theatre management is a sub-set of arts management); organisational behaviour (to explore the Pro-Am theatre construct from the organisation’s perspective); leisure studies (to consider why amateurs participate in Pro-Am work); and performance studies, with elements of theatre studies (to provide insight into creative processes and the related challenges of managing Pro-Am projects). The literature review is supplemented by pertinent cultural policy documents, industry publications and journalistic reports.

The literature review is divided into two chapters which underpin the inquiry into Pro-Am theatre in SPTOs:

1. Micro environment: The organisational implications. This is structured according to the three central themes of leadership, risk and innovation.
2. Macro environment: The ‘society’ of the study. The external policy and funding backgrounds of SPTOs and the context surrounding the Pro-Am theatre concept.

The review highlights gaps in current knowledge and this study’s contribution to theory relating to arts and theatre management, provides theoretical justification for selecting the two cases and inspires the fieldwork.

The following figure illustrates the bodies of literature and other resources used in the research:

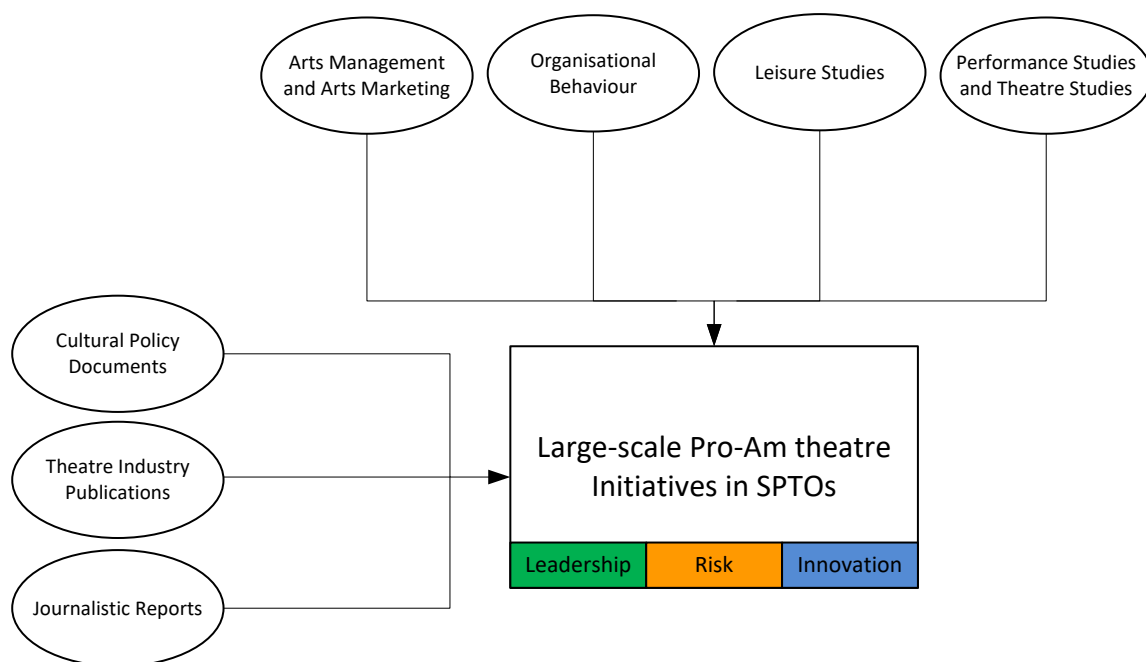


Figure 2: Literature map.

1.8.1 Introducing the central themes

The principal themes of the study were developed on the basis of addressing all the stages of delivering a large-scale Pro-Am initiative from an organisational perspective: conception of the project, budgeting, developing the strategy, assembling the creative team, production design, marketing, auditions and casting, rehearsals, the final production, and assessing the reaction to and impact of the project. Each central theme is broken down into sub-themes in order to explore them in depth.

LEADERSHIP

The leadership sub-themes are:

- Types of leaders - different leadership styles evident within the case study projects.
- Artists as leaders - leaders' backgrounds and the benefits of artistic experience.
- Strategic rationale - the influencing factors for undertaking Pro-Am initiatives.
- Flagship cultural leadership - how some of Britain's largest SPTOs might influence industry practice regarding large-scale Pro-Am initiatives.

RISK

The risk sub-themes are:

- Artistic risk - programming strategies, the complexities of co-production.
- Reputational risk - the pressure to keep innovating, and Pro-Am work as a call to action, inviting participants to be a part of the SPTO's brand.
- Financial risk - funding strategies for Pro-Am projects.
- Operational risk - the logistical challenges of Pro-Am work.
- Perceived risk envisaged by the participants - whilst this study is rooted in the organisational perspective, it is pertinent to take into account the viewpoints of some of the many people who risk the investment of their time to take part. Understanding this opportunity cost can help the organisation develop the offerings with a view to mitigating this risk and therefore increasing participation.

INNOVATION

The innovation sub-themes are:

- The Pro-Am *process* – how a creative process is developed which attracts participants, whilst also developing;
- The Pro-Am *product* - a high quality final production, tickets for which are sold to the public and which will stand alongside the other, 'professional' work of the SPTO.
- Management of the space - how receptive the SPTO is to having large numbers of participants in the building.
- Marketing - the challenge of a dual marketing strategy which targets both participants and audiences.

1.9 Timeliness: the practical view

It can be argued that we are experiencing something of a zeitgeist in the recognition of public participation in arts and leisure activities (Henley, 2016; Holden, 2015). 2015 saw prime time television shows dedicated to amateur baking, painting, interior design, pottery, gardening, singing, performing arts and dress-making. Further recent examples of the prominence of public creative activity include:

- The seminal report by the Warwick Commission on the future of cultural engagement entitled "Enriching Britain: Culture, Creativity and Growth" (Neelands et al, 2015). The report's main argument is that central government and the UK's creative and cultural

industries should work collaboratively to ensure nationwide public access to creative education and activity.

- The BBC's "Get Creative" initiative. This year-long campaign launched in February 2015 is designed to, "shine a spotlight on the creativity that surrounds us everywhere in venues of all shapes and sizes: from village hall to the concert hall, and of course at home" (Get Creative, 2015). The initiative is developed in partnership with several organisations which promote arts participation, such as:
- "Fun Palaces". Launched in 2014, a campaign designed to put culture at the heart of local communities. An annual weekend of events is held where organisations and individuals are encouraged to hold events for local people to participate in arts and science activities. "We believe in the genius in everyone, in everyone an artist and everyone a scientist, and that creativity in community can change the world for the better" (Fun Palaces, 2016).
- "64 Million Artists". A campaign which aims to encourage and support people in experiencing the benefits of creative practice. "We use a simple, fun and free process: 'Do, Think and Share', to support people who'd like to use creativity to express themselves, get a bit more of a spring in their step, or connect better with others" (64 Million Artists, 2016a). In 2016, 64 Million Artists was commissioned by ACE to conduct a study called;
- "Everyday Creativity". This report seeks to develop an understanding of the ecology of everyday creative practice across England. It was conducted in collaboration with Fun Palaces, and Voluntary Arts, an organisation which supports the umbrella bodies of arts participation groups and societies across the UK. The "Everyday Creativity" report makes recommendations on how ACE can encourage a culture of public creative practice, which it structures across three main themes of, "Valuing, Supporting and Democratising" (64 Million Artists, 2016b).

These examples suggest an increasing recognition and celebration of amateur creativity in the UK and a growing trend for developing initiatives which create art *with* the public (Crawford, Gosling, Bagnall and Light, 2014; Leadbetter, 2009).

1.9.1 Examples from theatre

The celebration of non-professional practice in the theatre industry, along with the blurring of boundaries between what might be considered ‘amateur’ and ‘professional’ is evident in a number of recent projects:

- “Love Theatre Day”, launched in November 2014, is an annual online celebration of theatre which is open to both amateur and professional companies and individuals. There are three main strands to the day, “#Backstage” offers insight for audiences and theatre-makers into how a theatrical production comes together, “#AskATheatre” provides access to theatre professionals who answer questions directly, and “#Showtime” gives the opportunity for those who cannot make it to a theatre to sit in the “virtual stalls” and watch a production via social media. The aim of the initiative is to increase engagement in both amateur and professional theatre in the run-up to the busy festive period (LoveTheatreDay, 2015).
- “Blood and Chocolate” was a 2013 co-production between three SPTOs, York Theatre Royal, Pilot Theatre Company (based in York) and Slung Low Theatre Company (based in Leeds). The production told the local story of chocolate workers in York during the First World War. It ran for three sold-out weeks. An audience of 300 were led through the performance, which took place on streets of the city. There was a cast of 180 local performers and a team of 600 volunteers who worked on every aspect of the production. One critic noted “it takes theatre out of the theatre where it is hidden and makes it visible” (Gardner, 2016b).
- “The York Mysteries” was a reworking of the biblical “Mystery Plays”, staged in York Minster in 2016, which ran for five weeks. It was more than a year in the making, involved around 200 community performers, one professional lead actor and a large number of back stage volunteers. It was developed by a team of experienced professional practitioners.
- Many SPTOs in England currently offer some kind of adult participation activity. There are a number of different models and ways for non-professionals to make theatre within these organisations such as skills workshops and masterclasses, summer schools, play readings, and community casts and companies.

These examples demonstrate how the 21st century has so far seen a plethora of arts and theatre participation initiatives, and new ways for professional and non-professional theatre-makers to collaborate.

1.10 Introducing the cases: Pro-Am(A) and Pro-Am(B)

In order to address the central question and objectives, qualitative data has been gathered primarily through explanatory case studies (Yin, 2003) of Pro-Am initiatives in two renowned SPTOs. SPTOs can come in all shapes and sizes, from small companies with no designated performance space, to complex multi-venue organisations. The SPTOs in this study are large, established flagship organisations which have created ambitious Pro-Am initiatives and have opened the doors of their iconic buildings and encouraged amateur participants to perform on their renowned stages. Purposeful sampling was used to select the two case studies, on the basis of them being the “best”, most optimal example of the phenomenon” (Richards and Morse, 2013, p.89). Although there is some contextual investigation, the aim is not to explore the organisation as a whole, but to focus on one significant Pro-Am initiative within each organisation, then carry out a comparative case analysis of the two. Both organisations receive public funding and are registered charities. Both have extensive outreach programmes and are committed to engaging with the public through adult and youth projects.

1.10.1 The regional perspective – SPTO(A)

This organisation is a large regional theatre which opened in the 1970s. It creates its own in-house productions, some of which have toured the UK or transferred to London, and also receives touring productions from other companies. It comprises three theatrical auditoria, stages around seven hundred performances a year to a combined audience of around four thousand people, and employs three hundred staff. (Figures taken from SPTO(A) website, 2016). The organisation has been awarded the accolade of regional theatre of the year on more than one occasion in recent years. Its mission centres on the power of theatre and the arts to change people’s lives. It was one of the first theatres in the UK to have a designated ‘learning’ department to develop engagement and educational outreach projects. Public funding (consisting of ACE and local council support) currently makes up 16% of income, with 62% from ticket sales and the 22% from fundraising activities. (Statistics taken from SPTO(A) 2013 annual report).

1.10.2 Pro-Am(A)

The Pro-Am project within this organisation is an intergenerational theatre company, open to ages twelve and upwards. The initial idea came in 2010 from the artistic director of SPTO(A), who was inspired by an aging population and a lack of opportunities for adults to participate in theatre, compared with young people. In a newspaper interview at the beginning of their tenure, the artistic director stated that success would be measured through levels of local engagement with the organisation and its buildings, and not only through audience attendance figures.

The organisation had already undertaken Pro-Am work prior to this study, comprising choruses of local community performers integrated within professional casts in several productions. This had proved a popular initiative with participants as well as providing artistic rewards. As a result, the artistic director was keen to explore the potential for developing a designated community company. The aim was for this company of local amateur performers to become part of the organisation and potentially stage its own full-scale productions on the theatre's main stage. In 2011 SPTO(A) formed and launched Pro-Am(A), with the inaugural production involving sixty performers. At the time of writing, the company has over two hundred members and is supported by a four year grant from a charitable trust. There have been four full-scale productions to date, with each one progressively increasing in scale.

Reasons for selecting Pro-Am(A):

- Insight into the effects of a long-term Pro-Am theatre initiative on an SPTO. The initiative has been monitored throughout the duration of the study (2011 to 2016), with formal fieldwork beginning after production 1.
- Regional perspective on Pro-Am theatre and how an SPTO engages with people in the local vicinity; developing lasting relationships with participants and establishing new ones.
- Based on the idea to create an intergenerational community theatre company which was integrated into SPTO(A) and whose 'members' could participate in theatre-making in a variety of ways.
- Insight into the inner workings of Pro-Am theatre in a large regional theatre organisation.

- Additionally, I had pre-established access to the organisation, having carried out an academic study into the feasibility of the Pro-Am(A) concept in 2010, as part of an MSc qualification.

1.10.3 The national perspective – SPTO(B)

This organisation is one of the largest theatre companies in the UK, with a global reputation. Although its origins date back to the late 19th century, the organisation in its modern form staged its first full season in the 1960s. Its mission is to connect audiences with the finest productions of classic and new work. It employs around seven hundred people and in its 2014-2015 annual review states that over two thousand performances of twenty-eight productions and co-productions were staged, and 1.8million tickets sold to audiences across the world during that year. ACE supplies around 25% of the organisation's annual funding, with 54% generated from ticket sales, around 6% from fundraising and the rest made up from other activities such as royalties, and trading income from subsidiaries. (Statistics taken from SPTO(B) 2014-15 annual review).

1.10.4 Pro-Am(B)

The Pro-Am project within this organisation is the biggest ever Pro-Am initiative in the UK. The project has had two phases, 2011-2012 (phase 1) and 2013-2016 (phase 2), with the initial idea being born out of the plans for the 2012 Cultural Olympiad.² The organisation aimed to bridge the gap between the amateur and professional spheres and, similarly to the objective of Pro-Am(A), offer adult amateur participation the same status and access to opportunities which have been afforded to youth theatre. Phase 1 of the project was deemed so successful that the organisation's leaders decided to continue the concept and develop phase 2. The project has been supported by the same charitable trust as Pro-Am(A), with SPTO(B) applying for two rounds of funding, one for each phase of the project.

² The Cultural Olympiad was a four year project (2008-2012) which was part of the 2012 London Olympics. It was the largest cultural programme of any previous Olympic or Paralympic Games and included the London 2012 Festival, World Shakespeare Festival and numerous events across the UK. It culminated in a total of 43 million public experiences of cultural events and activities. An overview of the project can be found at <http://www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/reflections-cultural-olympiad-and-london-2012-festival>. (Retrieved February 5, 2016).

The structure of the project is that pre-existing autonomous amateur theatre groups apply to SPTO(B) with an idea for a Shakespeare-themed production. The successful groups work with SPTO(B) and selected partner theatres across the UK on developing their own productions through 'skills exchange' workshops, where the amateur participants are tutored by professional practitioners. These productions are then staged in a wide range of theatrical and non-theatrical spaces across the UK. Between 2014 and 2015, during phase 2 of Pro-Am(B), more than sixty thousand people saw these productions.

Reasons for selecting Pro-Am(B):

- Insight into the effects of a shorter-term Pro-Am initiative on an SPTO, with finite periods of three years (phase 1) and four years (phase 2). The fieldwork began at the mid-way point of phase 1, enabling investigation into how the project was developed and amended in phase 2.
- National perspective on Pro-Am theatre, and how an SPTO engages with large numbers of participants across the UK.
- Based on the idea of exchanging skills and experience with people who have a pre-existing passion for theatre practice, and to celebrate the amateur theatre sector.
- Inner workings of Pro-Am theatre in a large and high profile organisation, and compare these with those of SPTO(A), which, while prestigious in its own right, is smaller in stature.

Pro-Am theatre presents a complex set of managerial challenges for SPTOs, making it a fitting unit of analysis with which to address the central research question. The study explores two different models of Pro-Am initiatives. In Pro-Am(A), the SPTO forms a company of individual amateur participants, who have opportunities to appear as supporting cast members in productions with a professional cast, and also in their own full-scale productions. In Pro-Am(B), the SPTO works with pre-existing autonomous amateur theatre companies in a collaborative way. The creative practices involved in Pro-Am theatre are explored, with a view to understanding how SPTOs manage the relationships between amateur and professional theatre-makers and create the final productions.

In considering the organisational implications of Pro-Am initiatives, the artistic, administrative, logistic, and pastoral elements are explored, as well as how SPTOs approach

fundraising and marketing for their Pro-Am work, how much the 'outreach' or 'learning' departments operate autonomously to create Pro-Am projects, and how implicit the concept has become within the organisations. This highlights how this PhD contributes theoretically to the discourse of theatre management by looking at the themes of leadership, risk, and innovation in a new context.

1.11 Thesis structure

This chapter has introduced the study by explaining its rationale and purpose. The inquiry has been positioned and its timeliness highlighted. The central themes and bodies of literature underpinning the study have been presented, and the case studies introduced.

The next two chapters review the relevant literature to underpin the study theoretically and highlight the gaps in current knowledge which this study can fill. A detailed methodology chapter follows the literature review. The findings are then presented across three sections which are structured according to the central themes of leadership, risk and innovation. The discussion chapter then expands on the most significant points to have emerged from the findings and consolidates the study's contributions to knowledge. Finally, the concluding chapter explains how the central research question, aim and objectives have been addressed, and proposes an agenda for further study.

2 Literature review: Micro environment

The first chapter of the literature review focuses on the micro environment of large-scale Pro-Am theatre initiatives in SPTOs, in order to understand their inner workings. Historically, much of the available literature concerning arts management has taken a pragmatic and instructive approach (Pick and Anderton, 1996; Freakley and Sutton, 1996; Edwards and Tolley, 1994; Pick, 1980). This research has a practical application, but primarily employs academic theory to critically evaluate the motivations, processes and organisational implications of large-scale Pro-Am theatre initiatives in SPTOs. This synthesis of the relevant literature is then combined with findings from the empirical data to report back to arts management and performance studies with a detailed understanding of the phenomenon.

Evrard and Colbert (2000) claim that rather than general management theory being transposed onto the arts, researching the specific challenges of arts management can contribute to general management theory. Arts management has gained recognition as a scholarly discipline in the 21st century, yet there is a dearth of detailed empirical studies on management and leadership functions within the arts (Cray, Inglis and Freeman, 2007; Lohmann, 2001; Evrard and Colbert, 2000). This study aims to fill this gap in knowledge.

There are similarities in the prevalence given to the fields of theatre management studies and theatre education studies. Omasta and Chappell (2015) claim that “Theatre education occupies a liminal space in the academy, ‘caught between’ two seemingly disparate fields: theatre (the study of performing arts) and education (the study of teaching and learning)” (p.186). The same could be said of theatre management. Management studies and organisation studies are both vast fields, and performance and theatre studies also encompass a broad range of topics. These scholarly fields have been negotiated in order to underpin the concepts of this study. Theatre management is often amalgamated into arts management, and this study adds to the literature in this field, making it relevant to scholars of the arts and the social sciences.

Much of the arts management literature reviewed focuses on the ‘non-profit’ or ‘subsidised’ sector, meaning organisations which rely on either public subsidy or generated revenue to survive and are often registered charities. There is less written about the ‘for-profit’ commercial sector. This is because managers of enterprises such as SPTOs require manifold

skills and must balance the “three mutually supporting commitments: to excellence and artistic integrity, to accessibility and audience development; and to public accountability and cost effectiveness” (Chong, 2010, p.19). Policy and funding stipulations instigate strategic planning within SPTOs regarding the provision of participation activities, which is explored in the next chapter.

The first chapter of the review synthesises literature underpinning the strategic management of Pro-Am theatre in SPTOs. Varbanova (2013) states “strategic management in the arts is an art itself and is ‘situation specific’” (p.xiii). This review has been structured according to the three central themes which underpin the strategic management of the ‘situation’ of Pro-Am theatre within SPTOs. These themes emerged from the initial motivation for the study, which was to understand the growing phenomenon of large-scale Pro-Am theatre in SPTOs from an organisational perspective. The process of creating a theatrical production (adapted from Dean, 2002) is broadly set out below:

1. Conception of the project
2. Budgeting
3. Developing the strategy
4. Assembling the creative team
5. Production design
6. Marketing
7. Auditions and Casting
8. Rehearsals
9. Performance
10. Feedback and assessment

In applying this model to the creation of large-scale Pro-Am theatre projects, the most pertinent themes have been identified as:

Leadership - the organisational decision to create the project, the extent to which it is incorporated into the organisation, the resources allocated to the project (1-6 and 10), and the creative leadership of directing the production (7-9).

Risk - diverging from the SPTO’s core competence of creating professional productions (1-10).

Innovation - how the SPTO creates a stimulating process for participants and a high quality production for audiences (4-9).

Key attributes have been selected from the bodies of literature relating to each theme to collectively underpin the concept of large-scale Pro-Am theatre in SPTOs.

2.1 Leadership

Pro-Am theatre is a pertinent concept for an arts management study because it is a complex mixture of strategic, organisational and operational governance. The following section focuses on leadership theory, with a view to understanding the motivations and challenges for SPTO leaders who embark on a strategic direction which incorporates complex and risky large-scale participation initiatives into the organisation. In this study, as in a theatre organisation, a leader can mean someone who runs the organisation, manages a project, holds a workshop, or directs a production. As Holden (2011) puts it: "Leadership these days exists, indeed it *has* to exist, at many levels within an organisation" (p.181).

2.1.1 Types of leaders

Leadership styles and roles have been debated and researched extensively (Mintzberg, 2009; Wright, 1996; Kotter, 1990; Yukl, 1989; Katz and Kahn, 1978; Zaleznik, 1977; Drucker, 1968). The terms 'manager' and 'leader' are often used synonymously. However, in most cases, a manager is defined as a facilitator of tasks, and a leader as one who inspires 'followers' and embodies an organisation's values and vision (Redman and Wilkinson, 2009).

Cray et al (2007) posit that the four main styles of leadership relevant to arts organisations are "*charismatic, transactional, transformational, and participatory*" (p.299). There is debate surrounding the meaning and application of each of these definitions, but according to Cray et al (2007), *charismatic* leaders have powerful personalities which inspire trust and devotion, however there can be negative effects if followers feel obligated to please the leader, which diminishes their independent action. *Transactional* leaders adopt a mutually beneficial approach to working with followers, clarify expectations, enforce rules, provide resources and swiftly address any dip in standards. *Transformational* leaders also have charisma, but use it to encourage followers to engage with and develop a vision by contributing ideas. The needs and abilities of each follower are valued, which can encourage followers to perform beyond expectation. *Participatory* leaders are those who include followers in decision-making

processes. This can be valuable as the followers (or participants) are the ones charged with implementing the decisions and delivering results, however it can also make an organisation slow to react to environmental changes. Cray et al (2007) recognise there are strengths and weaknesses to each style and each can be effective, ineffective, or even damaging, depending on the circumstances. Furthermore, an arts organisation may require different styles during its lifetime and some leaders even adapt their personal style to suit the purpose or needs of the organisation.

The concept of charismatic leadership in theatre and other arts organisations is examined in detail by Nisbett and Walmsley (2016), who are critical of typologies such as those presented above, inferring they are reductive, and that personality traits do not fit into neat categories. Nisbett and Walmsley (2016) suggest “charismatic leaders are seen as extraordinary individuals and are excessively romanticized by arts managers, policy-makers, and audiences” and that this view should be treated sceptically “to temper any negative impacts on ‘followers’ and organizations” (p.2).

A pioneering theorist of charismatic leadership, Weber (1968) describes charisma as an extraordinary or divine quality which sets some leaders apart and inspires followers to trust them. This would therefore mean that charismatic leadership is personal to an individual and cannot be taught.

Scholars who argue that charisma is not a personality trait, but created through the relationship between leaders and followers include Jermier (1993) and Steyer (1998). Gardner and Avolio (1998) depict the relationship between charismatic leaders and followers as “dynamic and iterative” (p.53), claiming that in the relationship between followers and charismatic leaders, a “collective identity and efficacy of beliefs” (p.52) can be enhanced both by interactions with the leader and through the encouragement of interactions with each other. Hollander (1992) states that both leadership and followership are active roles, with the activity of followers able to affect and even constrain the process of leadership: “finding ‘new’ or ‘better’ leaders requires attention to their ability to engage followers in mutually productive and satisfying enterprises” (p.74). Howell and Shamir (2005) also argue that, rather than being dictated to by ‘heroic’ charismatic leaders, followers empower charismatic leaders. This can counteract the danger of charismatic leaders abusing their power. They argue that charisma is not completely leader or follower-produced, but define charisma as “a

relationship that is jointly produced by leaders and followers” (Howell and Shamir, 2005, p.108).

Rai and Prakash (2016) claim that charisma can be both taught and be intrinsic to individuals, arguing “charisma, like other individual traits such as intelligence and courage, is attributed by society through consensus after evaluating the life history of an individual” (p.48). This suggests that a successful leader is more likely to be called charismatic than an unsuccessful one.

Styles of leadership and in particular the concept of charismatic leadership are considered in this study, with a view to understanding how initiatives as ambitious as large-scale Pro-Am projects are introduced and incorporated into the SPTOs.

A pioneer of theory on followers, Goffman (1959) suggests that an individual adapts their social interactions, like an actor playing different roles, and that followers of charismatic leaders can be ‘near’ or ‘distant’, with near followers responding more strongly to charismatic leaders. In the case of this study, near followers could be taken to mean either the participants, or the staff within the SPTOs who are charged with facilitating the leaders’ visions for the Pro-Am initiatives, and distant followers as the audience members or people outside the organisation but who have a relationship with it.

Chaleff (2001) argues that the followers’ position should be championed in the theory exploring leader-follower relationships across an organisation, because followers are not merely passive and compliant, but have motivations and predispositions which are integral to the relationship. This is supported by Uhl-Bien, Riggio, Lowe and Carsten (2014), who claim that following behaviours are vital to the process of leadership and “represent a willingness to defer to another in some way” (p.83). Weber and Moore (2014) also argue that only through the actions of that first follower is a leader made, which is supported by Hurwitz and Koonce (2017) who state that “leadership stems from people who are willing and able to take on an active followership role” (p.42).

Antonakis, Fenley and Liechti, (2011) claim that modern theory on charismatic leaders explains those who “communicate in vivid and emotional ways that federate collective action around a vision” (p.376). This study will also consider the relationships between leaders and followers in the introduction of large-scale Pro-Am initiatives in SPTOs. This will extend the

theory on leader-follower relationships within the performing arts, which, as highlighted by Nisbett and Walmsley (2016), is underdeveloped.

Klaic (2012) highlights the particular complexities for leaders of theatre organisations:

A performing arts leader interacts with ensembles and stars, with teams and crews, with departments and services, with artists, artistic collaborators and boards, as well as managerial, administrative and technical staff. Despite all the inevitable delegation of responsibilities, he or she lives the structural tension of all the interdependence among those functions and tasks to the full, as well as being engaged in the continuous fine tuning of their responsibilities, motivations, predilections and understanding of the entire endeavour and their contribution to it (Klaic, 2012, p.160).

Byrnes (2015) suggests that both formal and informal leadership styles can be found in arts organisations, with a formal leader granted status through their job function, such as the director of a play or executive director of an SPTO who is afforded “formal authority by the organisation to act on behalf of the organisation” (Byrnes, 2015, p.273). An informal leader “grows out of specific situations, where an individual steps in and takes over or through a shadow organizational structure” (p.274). This style is also known as emergent leadership, which Pescosolido (2002) argues can alternate between group members according to the needs and emotional responses of the group and can therefore increase solidarity and communal action. Indicators of these complexities and styles are monitored in the study and their implications considered.

Arvonen (2009) argues that a significant component of leadership in the 21st century is “managing an environment of turbulence, uncertainty and change” (p.304). Gryskiewicz (2009) supports this assumption, suggesting that good leaders not only read and react to turbulence but can see the value of bringing a controlled amount of it into the organisation. This ‘positive turbulence’ is defined as “a condition of organizational renewal” and “the primary means of ensuring that organizations not only survive change but prosper from it” (Gryskiewicz, 2009, p.99). This study considers whether the introduction of large-scale participation initiatives can be a form of positive turbulence within SPTOs.

Large-scale Pro-Am theatre is a complex phenomenon given its intricate management structures. For example, the artistic director assigns the project manager, who builds a team of professional facilitators made up of freelancers and routine workers, all of whom are collectively charged with managing amateur performers within the professional space. This

can lead to potential issues such as a conflict of artistic visions (Bilton, 2007). This study offers insight into the relationships between different types of leaders and managers within SPTOs, by exploring the routines and processes involved in commissioning and developing Pro-Am initiatives.

2.1.2 Artists as leaders

ACE's "Achieving Great Art for Everyone" theatre appendix (2010) states an ambition to encourage artists to develop their leadership skills, and for leaders to understand and respect the value of artistic experience. Antrobus (2011) also recognises the value of artists leading arts organisations because they have an intrinsic understanding of the core product. However Antrobus (2011) also points out that plays are not the only output in theatre organisations. Having a specialist in learning projects or arts marketing in charge of strategy can add value to the organisation. Lesavre (2012) extols the virtues of theatrical games and techniques as managerial training tools, stating they increase "self-confidence, awareness, creativity and intuition, and thus raising their personal and public effectiveness, as individuals and as team members" (p.246). This argument is further supported by Corsun, Young, McManus, and Erdem (2006) who claim that improvisational theatre game workshops can improve communication and mitigate the negative effects of perceptual shortcuts on managerial functions. Studies like these suggest that managers who have been actors or have a theatrical background should be well-equipped to lead organisations and manage projects. Mangham (1990) goes further, suggesting "the activities of senior managers are isomorphic with the activities of actors" (p.105) and that theatrical techniques can make powerful pedagogical tools for managers by encouraging creativity and individuality. Rhine (2006) argues that Shakespeare should be viewed as both an artist and leader: "He had a vision for the Globe and for the theatre of his day. He saw that things could be different and convinced those around him that his vision had to be realized" (p.40).

There is an established scholarly relationship between theatre and organisational studies. This is mostly in strategic terms, using techniques from theatre to apply to management (Beirne and Knight, 2002). Austin and Devin (2003) suggest there are operational models within arts organisations which should be transferred to other industries. They claim managers should forgo "more traditional management models if they want to create economic value in this new century" (p.xxii). They argue that managers should adopt a model

of “artful making” and that they could garner a great deal of insight by studying the collaborative nature of art-based processes, particularly theatre:

A theatre company consistently delivers a valuable, innovative product under the pressure of a very firm deadline (opening night). The product, a play, executes with great precision. Incorporating significant innovations every time, but finishing within 30 seconds of the same length every time (p.xxiii).

A “temporary system” is an organisational strategy, defined by Goodman and Goodman (1976) as “a set of diversely skilled people working together on a complex task over a limited period of time” (p.494). The authors also evoke the concept that the theatre industry is built on temporary systems, with a set of skilled people collectively developing and staging a production, only to disperse on completion. In fact, some of those occupying these roles may never even meet, with each working independently and the director as intermediary. Bilton (2007) also reflects on the creative system of theatre-making and argues that good managers will leave space in the system for unexpected things to happen.

It is usual in SPTOs in England that artistic directors not only develop and implement the vision of the organisation and select the season of work, but are also practising directors. Theatre directing is a vast subject, with many definitions and interpretations. Stevens (2013) defines a director as “an artist whose materials are other artists” (p.1). Bogart (2001) describes directing as the art of adopting inherited tools and procedures in order to create a ‘gift’ for an audience: “the actions originate in the impulse to give someone a gift and the urge to create a journey for others outside of their daily experience. This instinct requires generosity, interest in others, and empathy” (p.4). Trousdell (1992) labels directing “a hidden art, conducted in rehearsal behind closed doors, and concealed in production behind the work of the playwright, designer, and actor” (p.27). Trousdell continues that directors take on the roles of playwrights and actors in rehearsals, by playing and shaping events, but additionally, what is unique to their craft is the way they create situations “whose physical, intellectual, and emotional context brings a play to life in behavior as structured experience” (p.27) and that “through their engaged and articulated watching and listening, a function that the audience will later assume, directors create the primary theatrical context: the attentive moment” (p.27).

Recurring terms in the literature on modern directing styles are 'communication', 'collaboration' and 'leadership'. Hodge and Mclain (2016) call the director the leader of an artistic enterprise who must be an outstanding communicator: "The director must perceive, evaluate, make a diagnosis, and devise remedies" (p.2). The director interprets and communicates the vision of a playtext to audiences and must also communicate effectively with the cast and creative team to create the show: "The director also arbitrates the diagnostic process of rehearsals; discerning why a scene isn't working and then, like a doctor, prescribing a remedy" (Hodge and Mclain, 2016, p.246). What is common in the literature on directing is the advice to be positive, to listen to actors' responses and to have answers to all questions, even if it is "I don't know".

Roznowski and Domer (2009) suggest that collaborative directors should: be aware of the vocabulary they use throughout the process with designers, actors and the rest of the creative team; and have a distinct set of practices, such as establishing a chain of command but listening to all ideas, only proceeding when there is agreement.

Cohen (2011) states the director does not just direct the vision of the play, but also the players, meaning all the people involved in creating the production: "In combination, and only in combination, collaboration and leadership are crucial to theatrical production" (p.15). The director should study how the play's story, themes and socio-political and historical contexts are communicated by the playwright, how to communicate these to the audience and how to communicate with the performers and creative team. Cohen (2011) argues that merging the two seemingly paradoxical approaches of leading and collaborating can:

produce performances that are seamlessly integrated and forcefully propelled, that develop maximum theatrical impact...However, in order to create such mergers, theatre companies must create organizational structures that make them possible (p.15).

Innes and Shevtsova (2013) highlight the paradox which leaders/directors must negotiate in order to work collaboratively, with an ensemble approach, whilst also orchestrating the production. In this scenario, the director is not the sole source of inspiration, which can come from anyone else in the process. This questions whether a prescriptive, individual vision is appropriate in what is essentially a collaborative art form. Knowles (2015) also discusses theatre directors taking a collaborative approach and the need to communicate both with

audiences and performers. Leading the collaborative process is particularly important for new writing, when the director also works with the playwright, and in work which is devised. This study considers the directorial styles evident in the Pro-Am creative process and explores the differences between working with amateurs and professionals, and small and large casts.

Boyle and Ottensmeyer (2005) recognise the value of including artists and artistic processes in management and leadership strategies, as do Dunham and Freeman (2000), who state that modern businesses would be better equipped to face challenges such as budget cuts, launching a new product or business, or entering a new market by emulating the best practice of theatre directors. This is divided into three key processes pre-production (analysis, interpretation, planning); creating a vision; and building the right team (casting). Beirne and Knight (2002) go as far as to caution arts managers against reacting to external pressures to inject commercial discipline and adopt 'off-the-shelf' business tools and techniques. Instead, Beirne and Knight (2002) advise that arts managers embrace artistic processes, which may seem disordered to others, but in fact can offer creative ways to address challenges. Adler (2006) also suggests that societal, economic and technological changes present unprecedented challenges for organisations in the 21st century, which has prompted a trend for the 'cross-fertilisation' of management and the arts. Schiuma (2011) supports this assertion, claiming additionally that organisations should be treated as 'living organisms' and that the arts can be a resource for management and organisational development. This can achieve "targeted value-creation objectives" and contribute to the "creation and management of the emotive and energetic characteristics of organisations as well as to the development of organisational assets that incorporate intangible value" (p.2). By taking into account the backgrounds of SPTO leaders and Pro-Am project managers, the study considers the significance of artistic experience in facilitating the work and the value this creates.

Dual leadership model

Large theatre organisations are noteworthy for often operating under a model of dual leadership. The structure comprises an artistic director, who is usually the representative 'face' of the organisation and a chief executive (sometimes known as executive director), who Beggs and Doolittle (1988) define as the chief strategist. It varies between organisations as to whether ultimate responsibility falls to one leader or the other, or is jointly held. Cray et al (2007) mark the difference somewhat starkly, with the managerial leader safeguarding

“financial security and long-term survival” and the artistic leader concerned with “short-term artistic recognition” (p.299). Lapierre (2001) claims that because it is ultimately the mission of arts organisations to create art: “leadership is directed towards the achievement of an artistic goal and is the responsibility of the artists, regardless of their position within the organization. Management is in the service of this goal” (p.5). Lapierre (2001) therefore argues that the artistic director’s role is paramount. Landry (2011) characterises the relationship as having “divergent rationalities (a managerial logic and an artistic logic)” (p.48). Landry (2011) also recommends adopting a well-defined strategy for the succession of each role, as the ‘shotgun wedding’ of two unsuited leaders being thrown together can destabilise the organisation.

In exploring the dual leadership dynamic within non-profit professional theatre organisations, Voss, Cable and Voss (2006) find that multiple perspectives and diverging views on organisational identity between leaders can theoretically “offer more points of attachment for external stakeholders, and foster a more diverse and innovative workforce” (p.753). However, in reality, these benefits are likely to be precluded by confusion for stakeholders, dilution of resource utility and emotional conflict amongst staff. Ultimately the “organizational outcomes are maximized when leaders agree about the organization’s core, enduring, and distinctive values” (Voss, Cable and Voss, 2006, p.753).

Reid and Karambayya (2009) also recognise that conflict can occur between the two leaders which can be detrimental to the organisation, but argue that well-managed conflict can lead to a unified vision which can be disseminated through the organisation and address the “paradoxical co-existence of business and artistic objectives” (p.1073). Antrobus (2011) supports this, claiming that well-managed difference can generate innovative and collaborative working practice, and suggesting that, although two leadership salaries is expensive, a single leadership model puts intense pressure on that leader to hold responsibility for researching and developing the artistic vision, line management of staff, fundraising, fiscal management, external relations and business development. Collaborative leaders can strengthen the organisation by enabling each other, recognising and valuing their differences.

Both SPTO(A) and SPTO(B) have dual leadership models. Although the organisational structure is outside the case study boundary (the Pro-Am initiative), it is still of interest. There

is a gap in the theory on the importance of the dual leadership model in introducing ambitious new projects into an arts organisation. If the key to success lies in balancing artistic and business objectives, then it is valuable to understand how SPTOs address this in relation to the introduction of large-scale Pro-Am initiatives.

2.1.3 Strategic rationale

Decision-making is a key component of leadership and management. Tung (2006) and Cole and Kelly (2015) highlight the debate within management theory of the depiction of management as either an art or a science, and that the approach to decision-making can be related to these constructs. This study considers the rationale for introducing each Pro-Am case study project. Perhaps the leaders are reacting to a threat, whereby the decision is borne out of the need to solve a problem which might be within the organisation or posed by the external environment. Or, perhaps they are grasping an opportunity and are inspired by the possible internal benefits and the further potential to make an impact in the wider theatre industry and society.

Davis and Scase (2000) reflect on the inherent tensions of managing creative organisations, people and processes. In theatre organisations such as SPTOs, this is largely due to the project-based nature of the artistic output, coupled with the reliance on a constant flow of product innovation needed to thrive. Davis and Scase (2000) determine that leaders of non-profit performing arts organisations are likely to be as motivated by critical success and the strong reputation of the organisation as commercial success, and that this can be achieved by instilling an organisational culture which has integrity, so that staff feel invested in a strategy which is about more than generating profit.

Mintzberg (1987) considers strategy as positioning, meaning the way in which an organisation locates itself in its environment. This evokes strategy as the creation of a situation in which an organisation can thrive in some way, usually through revenue generation. Dreeszen (2007) defines strategic planning as the process by which an organisation articulates its mission and plan for achieving it. The process includes answering questions such as “who do we serve and what do they want? What difference do we want to make? What are our priorities? Where should we invest our time and money for best results?” (Dreeszen, 2007. p.67). The strategic rationale behind each case study Pro-Am project is considered and suggestions made as to how this strategy is positioning the SPTO.

To explore the rationale behind inviting amateur participants into an SPTO, it is important to consider how an organisation's values and beliefs are realised. Varbanova (2013) emphasises the role of organisational identity in the strategic management process, believing an organisation must "understand and demonstrate its values, uniqueness, originality, individuality and overall organisational culture and behaviour" (p.59). However, Schein (2010) labels the concept of organisational culture an abstraction, the multiple meanings of which are readily contested, and also comments that the phenomena which constitute culture can be invisible, unconscious, and unique to the individual, but can have a powerful impact. In terms of organisational research and managerial practice, Schein (2010) views organisational culture as having three levels: its surface manifestations (such as physical objects, behaviour patterns, practices and procedures); its espoused beliefs and values; and its basic underlying assumptions. Schein (2010) states "If you do not decipher the pattern of basic assumptions that may be operating, you will not know how to interpret the artefacts correctly, or how much credence to give to the espoused values" (p.32).

Schein (2010) also claims that the concepts of organisational culture and leadership can be indistinguishable. Cultural norms define how an organisation may view leadership and therefore how promotions are decided and labour divided. However, the main aspect of the leader's role is then to understand, create and manage the culture and ultimately, destroy that culture if viewed as dysfunctional. Huczynski and Buchanan (2007) state that organisational values can be created in different ways, such as through solving problems which have occurred in the past, or from the attitude and beliefs of an individual founder. Conversely, they also argue that historical factors and a common vision shared within an organisation can create values which "are always backward looking, despite being developed to contribute to the future development of the company" (p.629). The study considers the relationships between the introduction of the case study initiatives and the culture and values of the SPTOs.

Kaiser (2008) emphasises programming as the most important decision facing the leader of any arts organisation, defining the quality of the creative output as the "key strategic variable" (p.177). However, this alone is not enough for success, as it must be underpinned by a comprehensive plan. Kaiser (2008) recommends a short, clear plan which is nimble, adaptable and reactive to change, and claims that the ideal accompaniment to the strategic plan is "a

staff and board who think strategically every minute of the day” (p.177). Consideration is given to the strategic planning of each Pro-Am case study project with a view to understanding the how this affected their success.

Mission and vision

Organisations use mission statements to communicate their values and beliefs, both internally to members and externally to users or customers. Byrnes (2015) defines the *mission* as the purpose of the organisation and the *vision* as the outcome of successfully pursuing the mission.

In a study of Chicago-based theatre company Timeline, Sterling (2008) credited the organisation’s exponential growth in austere times to a strict adherence to an ambitious mission statement: “(The TimeLine Experience – creating unique and insightful artistic works and theatre going experiences that excite artists and engage growing, enthusiastic audiences)” (p.18). This suggests two clear objectives. First, offering a collaborative and attractive work environment to entice highly skilled artists and committed volunteers. Second, creating a high-quality, specialised product (in this case, productions with historical settings and contemporary relevance), adding value by offering a comprehensively captivating audience experience, and inviting feedback on the productions. Kaiser (2013) calls the mission statement “the foundation for the entire strategic planning process” but warns that drafting one “can often be a frustrating exercise in semantics” which “should not obscure the importance of delineating explicitly the goals of the organization” (p.15). Walmsley (2011b) echoes this, stating that “in any sector of any industry, value creation should refer back to an organisation’s fundamental mission” (p.18). This suggests the importance of Pro-Am projects reflecting the overall identity and objectives of an SPTO.

Voss, Cable, and Voss (2000) suggest five categories central to creating the mission statement for non-profit arts organisations. These are: prosocial dimension (provide and expand community access to and appreciation for art); artistic dimension (pursuit of artistic creativity, innovation and independence, potentially expand the art form); financial dimension (maintain and increase financial stability and security); market dimension (provide customer satisfaction and good entertainment value); achievement dimension (pursuit of artistic excellence which is publicly recognised and contributes to the field). The authors argue that

an organisation adds value through each of these dimensions, and that if these values are shared, resources can flow more easily.

In a later paper, Voss, Cable, and Voss (2006) state that the responsibility for the organisation's mission lies with the leader: "An organization's top leaders must be able to answer the question, 'who are we' [...] because it affects how they interpret issues, identify threats, craft strategy, communicate about the organization, and resolve conflicts" (p.741). Torkildsen (2005) also states that a leader develops both the vision for the organisation and the strategy to achieve it. Furthermore, a good leader maintains a dual focus on the overarching 'big picture' of the vision and the small details along the journey to realising it.

Mullins (2002) however, advises caution over the value of mission statements, claiming that whilst it is important for organisations to have clear ideologies, compiling a public set of values can appear trite and it is ultimately only as effective as those at operational level who instigate it. This could lead to potential conflict between certain members of an organisation, such as an artistic director who commissions a project (resource manager) and the project leader who is directly responsible for delivering it (utility manager). It also evokes Smith and Peterson's (1988) theory of leader as 'piggy-in-the-middle', managing conflicting demands from superiors and subordinates.

Hoyle (2013) advocates adherence to a strong mission for arts organisations to not only thrive in the future, but survive: "Tomorrow's leaders will overcome challenges through innovation, entrepreneurialism and creativity, through partnerships and collaboration, and above all through a steely focus on artistic mission" (Hoyle, 2013, p.14). Writing about arts participation in the context of museums, Simon (2010) argues that: "From the institutional perspective, participatory projects have value when they satisfy aspects of the mission" (p.13). This study considers the mission of each Pro-Am case study project and whether it aligns with the organisation's overall mission and values and provides benefits to the organisation, or whether it is a detrimental distraction from the goals of a professional theatre, and in business terms a strategic threat rather than an opportunity.

2.1.4 Flagship cultural leadership

There can be enormous pressure on the leaders of arts organisations to hold responsibility for their success or failure, with significant levels of personal credit and blame at stake (Meindl, Ehrlich and Dukerich, 1985). This scrutiny is increased for leaders of the UK's flagship arts organisations, meaning those cultural institutions which create local or national prestige and therefore contribute to tourism and the reputation of the arts and creative industries in the UK (Markusen and Gadwa, 2010). One reason for selecting each case study is that the organisations offering them are prestigious, publicly accountable, and of such repute that the theatre industry has been taking note, with the projects being discussed in the national theatre press.

Torkildsen (2005) suggests that turbulent policy and funding environments necessitate "entrepreneurial, creative managers who are prepared, within budgets, to be bold and take action, and lead, rather than simply react to what happens" (p.399). Gorton (2014) supports this assertion: "The new manager's modus operandi must be to seek new partners, solicit the views of many and enable others to deliver, whilst in turn offering innovative, desirable and sustainable product within the marketplace" (p.130). Landry (2011) adds that as well as fulfilling these objectives, leaders of arts organisations have a further obligation: "They are drivers of change but at the same time must take into account the constraints imposed on them" (Landry, 2011, p.49). This research considers the potential for the two case study SPTOs to be change agents through Pro-Am work, resulting in more SPTOs developing large-scale participation initiatives.

Hewison, Holden, and Jones' (2010) report details how the Royal Shakespeare Company changed from a traditional hierarchical structure to adopting an ensemble approach to both its internal management and external relations, which proved extremely successful. It was found that applying the principles of ensemble, similar to that of a company of actors being led by a director, resulted in 'organisational interconnectedness', with a strong emphasis placed on the acknowledgement of the emotions which affect organisational life: "Leadership has played an essential role in aligning the values of ensemble with strategic objectives and organisational change" (p.18). The changes included restructuring and democratising the organisation, with departments no longer working in silos, but having control of their own budgets and being involved in strategic planning. This evokes Mintzberg's (2009) theory of

organisations as communities, with a leader at the centre looking outwards, rather than at the top of a pyramid looking down. Cohen (2011) suggests:

Collaboration is the horizontal glue that holds an ensemble together and makes the work collective, mutually supportive, and the composite of many minds, bodies, and imaginations. Leadership is the vertical glue that gives the ensemble a direction, a focus, a goal, and a set of deadlines (p.46).

Cohen (2011) insists that hierarchical structures are essential for an organisation's longevity, but accepts that theatre structures are often more fluid and consensual than other art forms. The amount of debate generated, both in the industry and amongst arts management scholars, by this particular example of organisational change shows the impact that flagship arts organisations can make. In this study, attention is given to how the Pro-Am initiative has been embedded in the organisation, and whether this can be an example to other SPTOs.

According to Hewison (2004), a crisis in cultural leadership in the UK occurred early in the 21st century which was due to "low morale produced by government underfunding, low pay, loss of status, ill-defined career paths and over-regulation" (p.157). The need emerged for leadership training which was developmental rather than remedial, focusing on mentoring and learning on the job instead of merely fixing problems. Training programmes have been developed in the last decade which help artists who lead organisations to improve their leadership skills and find their authoritative voice. Some of these involve mentoring schemes with leaders from flagship organisations in which experiences, challenges and best practice are shared with trainees. As Holden (2011) states:

Leadership itself will continue to be an essential element in the pursuit of the noble aim of creating culture that involves everyone – a culture that combines an understanding of the past with the creativity of the present and a culture that hopefully passes on a richer inheritance to the next generation (p.193).

There is a distinct lack of literature available on flagship theatre organisations and their capacity to be change agents by taking risks and developing innovative new initiatives. This study considers whether SPTOs are cultural shapers or responders in their offering of large-scale Pro-Am opportunities and whether the working practices of flagship theatre organisations might have a ripple effect across the subsidised sector in terms of increasing levels of theatre engagement and blurring the boundaries between recognised models of amateur and professional theatre-making.

2.2 Risk

Following on from the theme of leadership, once the decision has been made to incorporate amateur performers into the artistic output of the organisation, this naturally leads to the consideration of the associated risks. Ben-Asher (2008) claims that “risk management is an indispensable process in the development of a new system” (p.285) and Bilton (1999) suggests that risk in the creative industries “stems from both the nature of the product and the nature of the creative processes” (p.17).

Risk management in the arts has been the subject of recent debate amongst theatre industry commentators. Gardner (2013) highlights the difficulties of managing risk in theatre-making, especially when funding is reduced. Gardner (2013) claims that theatres need risk-taking artistic directors in challenging times more than ever, and cites arguments from theatre practitioners campaigning for the protection of risk-taking in theatres despite funding cuts. They propose this can be achieved through theatre-makers, theatre organisations, and ACE working collaboratively (Kennedy, 2013). Wadeson (2013) also suggests that theatres can address the challenge to ‘do more with less’ by embracing risk and increasing activity, quoting one leader of a theatre organisation who states “people deal with risk by pushing it away from themselves...but by keeping the risk closer and managing it more closely, it can be a more creative space to be in” (Jubb in Wadeson, 2013, p.2). This study can contribute to the debate concerning risk management in the theatre industry by examining the threats and opportunities of large-scale Pro-Am work for SPTOs, and considering the ways in which the identified risks are attenuated. The specific types of risk are now explored in more detail.

2.2.1 Artistic risk

Crealey (2003) defines artistic risk as “risk that goes beyond financial failure” (p.28). The aforementioned AHRC report into cultural value reminds us that “the non-profit cultural sector contributes research and development for commercial cultural providers, while public funding enables them to take risks with creative content and ideas” (Crossick and Kaszynska, 2016, p.8). This research examines why SPTOs diversify from creating an artistic output solely with professional performers, and risk populating their stages with amateurs. Pro-Am initiatives must also compete in the market in terms of attracting participants away from other commitments.

There is a thriving amateur scene in the UK. The National Operatic and Dramatic Association (NODA) was founded in 1899 “to protect and advance the interests of operatic and dramatic art, and of societies engaged therein” (NODA annual report, 2015). It currently has over 2500 member societies in eleven regions across Britain. So there are plenty of opportunities for people to make theatre who have a passion for the art form. The unique selling point is of course, the ‘Pro’ in Pro-Am. It offers an opportunity which money cannot buy, to work with professional directors and appear on nationally and internationally recognised stages. But this is also what makes it such a risky enterprise for SPTOs. The ‘liveness’ of theatre means there are always inherent risks that something could go wrong on the night (Abbé-Decarroux and Grin, 1992) and untrained and potentially inexperienced amateur performers may not be able to react as effectively as professionals. This study considers the role of the practitioners and facilitators (White, 2013) who develop the projects and the ways in which they create Pro-Am productions which SPTOs can confidently place on the same stages as their professional work. There is also the risk that participants will not take up the offer of the initiatives. People with no theatrical experience may feel intimidated at the prospect of engaging with the large and renowned organisations and amateur theatre companies may reject the flagship organisations intervening in their practice. This study examines the relationship between the offer and acceptance of large-scale Pro-Am initiatives in SPTOs.

Eisner (2002) suggests that one of the rewards of working in the arts is the surprise of the ‘microdiscoveries’ which transpire through creative processes, but that the pursuit of surprise necessitates a willingness to take risks. Hewison and Holden (2011) state “creativity is all about risk” (p.163) and argue that identifying and mitigating risk are integral facets of arts management. To do this, the authors advocate addressing risk first in terms of *context*, then *probability* (likelihood of risk occurring), and finally *impact* (extent of the damage done should risk materialise). An organisational culture which is open and encourages collaboration and creativity is typical of the theatre industry, and it can be argued this is how initiatives like Pro-Am are developed. However, Boerner and Gebert (2005) argue that “cultural openness in a theatre company comes with risk” (p.209) because of the significant effort of coordination required. This study explores the juxtaposition of an open organisational culture which cultivates ambitious creative products like Pro-Am projects, with the extensive strategic planning and coordination required to execute them.

Collaboration is another facet of the artistic risk of Pro-Am theatre in SPTOs. All theatre-making is a collaborative effort (Stufft, 2013). In Pro-Am projects, there is not only the collaboration between the amateurs and professionals to negotiate, but also the collaboration or co-production between the SPTOs and external theatre companies and practitioners charged with delivering the projects. Both case study Pro-Am projects involve in-house facilitators as well as external staff. These relationships can create tension. Roznowski and Domer (2009) define collaboration in theatre as “a meshing of ideas” (p.1), which they classify as different from cooperation, which is, “a handshaking group of individuals promising not to tread on one another's toes” (p.1). The effect that the collaborators have on one another is an integral part of the creative process and there is a high degree of risk that the artistic vision for the production will not be realised. Or perhaps there is no final vision and a director works with performers to see what can be created from the starting point of an idea or point of interest. This devised approach to theatre-making increases artistic risk and requires a significant amount of emotional investment and commitment from the participants (Brian, 2005). Hewison (2014) argues that if creativity is dependent on risk “the corollary is that the risk-taker must be trusted to understand the risk being taken” (p.232). Applying this to the Pro-Am theatre concept suggests that the leaders of the SPTOs who instigate the projects must have the right team in place to execute the vision and understand the associated risks.

2.2.2 Reputational risk

It could be argued that there is a degree of reputational risk to SPTOs, both in offering and not offering ambitious initiatives like Pro-Am work. Palmer (2003) highlights the pressure on theatre organisations to keep innovating and the risk of safe programming, suggesting that successful organisations must remember it is likely that their positive attitude to risk-taking established their reputation in the first place. Bilton (2015) also argues that requirements from funders to create new initiatives based on their strategic priorities can put pressure on arts organisations.

Gardner (2015) notes the importance of being risk-aware but not risk-averse, suggesting that trusted theatre brands with established audiences (such as SPTO(A) and SPTO(B)) have a responsibility to ensure that they “don’t fall back on notional crowdpleasers, but put on

theatre that reflects the complexity of today's world and which speaks urgently and thrillingly about how we live" (Gardner, 2015).

Both of the case study Pro-Am projects produce new work, either commissioning writers or devising new plays. This is inherently risky (Palmer, 2003). Not only are there no 'star' names with which to sell the productions to audiences, but the performers are non-professionals, which may evoke a risk for ticket-buying audiences regarding the perceived quality of the production. Dempster (2006) highlights the role of media coverage and critical reviews in shaping public reaction to new productions and projects, which in this case could potentially affect support for Pro-Am work and either enhance or damage the reputation of the organisation, and encourage or discourage future participants. Palmer (2003) claims that "one obstacle to the institution's ability to take on new risks is the prevalence of critics who offer few rewards for daring leaps, rewarding instead only impressive landings" (p.66). This re-emphasises the pressure on leaders and managers to take risks, and the possible damage to an organisation's reputation if the risk is not successful.

The decision to develop Pro-Am theatre work introduces the potentially problematic issue of a manager or leader convincing the rest of the organisation of its merits, particularly if the initiative requires extensive internal funding. There is a reputational risk to the organisation if internal departments are unclear or unconvinced about the vision for the project. For example, if marketing and communications staff feel there is a perceived risk attached to putting amateur performers on the stage, they may struggle to sell the concept, either to participants or audiences. Matzke (1999) emphasises the importance of clear communication; internally, within theatre organisations and between facilitators and participants; and externally, with funding bodies. This can mitigate reputational and financial risks.

A strong brand can be a vital asset in arts organisations. Conte and Langley (2007) state "the entire organization is the brand, not just marketing communications" (p.331). In the case of this study, a strong brand can build an SPTO's reputation, promote loyal audience attendance and encourage participants to take part in Pro-Am projects who have never performed before, but who know and trust the organisation (Jyrämä, Kajalo, Johansson and Sirén, 2015; Vivant, 2011; Colbert, 2009,). Consideration is given to Pro-Am theatre as a 'call to action', with participants being invited to become part of the SPTO's brand and the relationship

between the success of the Pro-Am project and the brand of the SPTO, such as whether the brand adds value to the project, or whether the project risks damaging the brand.

2.2.3 Financial risk

Voss and Grabel (2014) claim that organisations risk 'mission creep' when there is the opportunity to secure funding from a provider with a particular agenda. This can come from any avenue, be it public subsidy, charitable donations, or commercial sponsorship. The authors argue that it is the manager's responsibility to decide whether to pursue the funding and potentially "take the organization out of alignment" (p.81). It is prudent in this research to inquire into the way Pro-Am initiatives in SPTOs are funded and whether the sources of funding align with an organisation's mission and values. As the former executive director of the largest funded theatre in England, the National Theatre, states: "a money decision is an art decision and an art decision is a money decision...the two things are completely inseparable" (Starr in Holden, 2015, p.7).

The added pressure of funding cuts is resulting in SPTOs increasingly having to look for new ways to add value to their creative output (Pine and Gilmore, 2011). The relationship between financial risk and theatre programming is evident in all realms of theatre (Boerner and Jobst, 2011). Productions can be any size or style and audiences may be attracted to a familiar play and repelled by a new one, or vice versa. There are no guarantees. With Pro-Am projects appearing on the same stages as the professional output of the SPTOs, it is insightful to explore the financial commitment and production values given to the work and whether the organisations subsidise the charitable trust rewards and box office income. Bennett (2009) defines producing theatres as organisations which "are responsible for creating productions and thus take the primary risk vis-à-vis box office receipts" (p.681). So not only do the risks of staging previously unseen work make producing theatres distinct from other organisations in the industry, but perhaps creating new productions which share the same stage as the professional shows but involve amateur casts escalate and complicate these risks. For example, a production with professional, and perhaps famous, actors which runs for several weeks arguably stands a greater chance of recuperating costs or perhaps making a profit than a production involving non-professional participants who have full-time jobs and can only commit to a run of five performances.

Drastic budget reductions may result in organisations increasing or decreasing levels of risk, and making difficult decisions regarding the division of resources between the two strands of their brand narrative; the elite producing professional work for which they are renowned, and the outreach projects like Pro-Am: “Programmatic choices adjusting the theatrical output are a prime instrument for the theatre management. It can adapt the number of performances or productions to the new budgetary situation or it can change the ‘nature’ of the theatre’s output” (Werck, Stultjes and Heyndels, 2008, p.2369).

In an interview with an arts industry publication, the leader of a large SPTO in England states that the education and community programme can lose money but that this is an acceptable, calculated risk given that outreach activities “are helping to define what we stand for internally and outside”, adding the buildings which comprise the organisation “cannot just be a profit-and-loss account and a balance sheet, they have to have a beating heart” (Sanderson, 2014).

Funded organisations like SPTOs are obligated to provide participatory agendas of some kind (Hewison, 2014), but why choose something as risky and ambitious as Pro-Am? This study therefore also considers the more cynical motivations for offering Pro-Am work. These include potential opportunities to: access new funding streams; increase audiences (such as the friends and families of participants); and strengthen the brand of the SPTOs, who appear benevolent for opening up the stages of such prestigious organisations to the public through large-scale and elaborate initiatives.

2.2.4 Operational risk

Dempster (2009) presents an operational risk framework for the performing arts and creative industries, which draws on theories from the financial services industry. Dempster’s (2009) research is inspired by McMaster’s (2008) review of the arts in Britain. The review was commissioned in 2007 by the then Labour government through the DCMS to report on how public subsidy can encourage excellence and increase participation, and to make recommendations for non-bureaucratic methods to assess the quality of the arts. Dempster (2009) evokes McMaster’s (2008) suggestion that excellence is achieved through innovation, and innovation is born out of risk: “The desire and ability to innovate and the willingness to take risks is fundamental for any organisation striving to be excellent. Boards of cultural organisations must therefore be the custodians of innovation and risk-taking” (McMaster,

2008, p.7). Dempster (2009) argues that risk can be a by-product of both internal and external factors and that an organisation must take responsibility for monitoring developments inside and outside its boundaries. The findings suggest that organisations disaggregate risks into distinct categories such as “aspects of organization, employment, institutional frameworks... participant behaviour...Confidentiality and contracting” (p.151), whilst also continuing to analyse “the complex interaction and relationships between different risks and their dynamics and underlying uncertainties” (p.168).

According to Colbert (2003), developing performing arts products is inherently risky for organisations because the products cannot be suitably tested, given that an audience is needed to bring them to life; cannot be stocked, meaning they are intangible and experienced live; and have a limited life-cycle, meaning each run of a production ends eventually, as even successful commercial musicals, which can run in the West End or on Broadway for years, can only accommodate so many audience members each night. Operational risks are arguably further increased when theatrical productions are taken off the stage and out into non-traditional performance spaces (Wilkie, 2002). Both case study projects have done this. The strategic management of balancing the logistic requirements with the artistic vision of a production is integral to creating any theatrical production, but the level of risk is significantly raised when large amounts of non-professional performers are taken outside the more manageable theatrical environment.

This study contributes to the lack of theory on managing risk in the theatre industry by investigating how SPTOs identify and mitigate the operational risks of staging large-scale Pro-Am work.

2.2.5 Perceived risk of participants

Perceived risk is defined by Johnson, Sivadas and Garbarino (2008) as “a customer’s anticipation of adverse consequences and feelings of uncertainty regarding the services provided by the organization” (p.355). Stebbins’ ‘serious leisure’ theory (1992) and Tomlinson’s (1993) research on the ‘culture of commitment’ highlight the dedication given to pursuits such as amateur theatre. Stebbins (1996) writes: “So poignant are the costs of serious leisure that many participants ask themselves from time to time why they do it” (p.61).

Nicholson (2002) suggests that trust between practitioners and non-professional participants is important, just as it is between professional directors and actors, and that a supportive environment encourages artistic risk-taking. This suggests that the participants need to feel their professional director or practitioner is competent and skilled enough to deliver what they are being asked to invest in. However, Nicholson (2002) also warns that over-familiarity and an atmosphere of trust with no element of risk is unlikely to lead to challenging and inspiring drama. In other words, participants want to be challenged and take risks. White (2013) speaks of “protecting participants into involvement” (p.94) in relation to audience participation activities in theatre, such as structuring workshops to be progressive, easing participants in with lower-risk activities and challenging them as their confidence grows. White (2013) evokes Bolton (1984) who expounds the notion of protecting participants into emotion rather than protecting them from emotion: “This requires a careful grading of structures toward an effective equilibrium so that self-esteem, personal dignity, personal defences and group security are not over-challenged” (p.128). This study investigates the degree of pastoral care involved in inviting large numbers of non-professional performers into a creative process which can be emotionally intense.

In a study of the meanings that both professional and non-professional performers attach to their involvement in drama, Grammatopoulos and Reynolds (2013) find that the degree of pleasure offered by engaging with this art form can lead to a sense of loss in its absence. They conclude that:

Flexibility of rules, uncertainty about whether one is the character one is portraying or oneself, and inaccuracy of reality of the experience are not disadvantages, but privileges. Drama is a safe place to risk one’s identity without losing it, and thus feel alive (p.122).

Performing as a way to lose one’s self within a story and become someone else in a safe space evokes Csikszentmihalyi’s (1990) theory of ‘flow’. This theory explores how people find enjoyment through creative activity, and the importance of creative activity in leading a fulfilling life.

The weight and complexity of meaning that people attach to their involvement in drama suggests a level of responsibility for SPTOs offering engagement opportunities such as Pro-

Am projects. The study considers how the Pro-Am practitioners create a supportive but challenging environment for participants.

2.3 Innovation

Finally, the study considers Pro-Am theatre as a form of dramatic product innovation. Evrard and Colbert (2000) claim that innovation management and project management are crucial yet under-researched elements of strategic arts management. It can be argued that the Pro-Am theatre case study projects are innovative because the SPTOs are adapting their creative and management practices in order to facilitate participatory theatre-making on a large scale. It is risky because it is innovative. It is innovative because it has a lot of variables and is unpredictable, which requires working practice to be amended. Bilton (1999, 2015) highlights the links between risk and innovation in the creative industries. Bilton (2015) defines innovation as referring to “the application of a creative idea, typically towards new products, new business models or management processes” but warns that focussing on the novelty rather than the value of innovative practice carries risk which can have “destabilising effects on the organisation” (p.155). However, when it comes to participation, Leadbetter (2009) argues that organisations should experiment with “a portfolio of experiments” (p.21) which engage and challenge participants in different ways; “testing the limits of collaboration rather than simply celebrating it” (p.26).

Bjorkegren (1996) highlights the difficulty of predicting the success of any arts product: “For a culture product to gain commercial success, its potential meaning has to be transformed into popular meaning” (p.42). As Crealey (2003) suggests: “artistic innovation might be considered a greater measure of new product success than profitability or box-office success” (p.28). A dramatic product such as a Pro-Am theatre initiative is distinctive in that it must appeal to two particular sets of stakeholders. Its process must attract participants and its end product (the performance) must attract audiences. The complexities of creating the intangible theatrical process and product have been scrutinised from different perspectives (Fisher, Spear Purcell, and May, 2009; Carlson, 1988). However, the specifics of the large-scale Pro-Am theatre process and product remain under-researched, highlighting this study’s contribution.

A stimulating creative process and high quality end product are integral to all models of theatre-making involving non-professional participants. In reference to community theatre, Burden (2001) describes a “collaborative process that raises personal awareness, raises consciousness of common constraints and develops skills. Process is as important as product” (p.35). In relation to amateur theatre, Cochrane (2001) states that “Amateur players continue to testify to the pleasure derived not just from performance itself but of group intimacy. The end result of the amateur project is often of less importance than the process of getting there, and the aftermath can be felt like a bereavement” (p.240). The balance of process and product is pivotal in this research. The Pro-Am theatre initiatives being investigated have received nationwide recognition for the organisations, but could not exist without the commitment of the participants. Therefore, perhaps a high quality product which appeals to audiences is as essential in securing the longevity of the concept and future funding as a fulfilling process is to participants. This study investigates how SPTOs approach the equilibrium of process and product when developing Pro-Am projects.

2.3.1 Process

Amateur theatre participants are motivated purely by their own dedication, whereas trained theatre professionals are also contractually engaged and arguably prepared for heavy rehearsal schedules, demanding directors with specific visions, and other challenges. Watson (2010) highlights the collective experience of theatre-making as an art form. This is integral to Pro-Am work, as amateurs can walk away from the process at any point if they are not having a fulfilling experience. This evokes Barnard’s (1938) theory of the acceptance of authority, which suggests that effective management stems from the willingness of employees to accept the directives of managers. Byrnes (2003) applies Barnard’s (1938) theory to managing volunteers in arts organisations, stating that the volunteers’ participation is based on their willingness to do what is asked of them: “If ‘orders’ exceed their usually unspoken sense of the scope of their volunteer effort, they will simply walk away” (p.53). In the case of Pro-Am theatre, the participants sign up to be part of a production that does not yet exist, and so must accept the instruction of the professional facilitators and practitioners in order to create it. If this process is not well-managed, they can withdraw their participation at any point, thus jeopardising the production, and perhaps even the whole project.

There are a number of different approaches to working with actors. For example, the actor and director Konstantin Stanislavsky (himself an amateur, according to Klaic (2012)) speaks of finding empathy and the emotional truth within performance, to 'be' rather than 'do'. Playwright and practitioner Bertolt Brecht speaks of the 'alienation effect', whereby the actor retains a critical distance and awareness of the message being conveyed to the audience. Actor, director and acting teacher Lee Strasberg developed Stanislavsky's ideas into what became known as 'The Method', which uses improvisation as a training tool and encourages the actor to immerse him or herself completely into the role. These are just some examples of the ideas and approaches directors use when working with actors in order to develop characters and create productions. Scher and Verrall (1987) also advocate the importance of technique: "Technique is needed to ensure that there is no obstruction between the actor and the audience he is trying to reach" (p.xiv). Lesavre (2012) explains that "The professional training of actors in drama schools involves specific pedagogical methods which work on the essential elements of the actor's craft" (p.243). Drama training also encourages more abstract abilities such as listening, self-confidence, and maintaining energy levels. Therefore, the Pro-Am creative process must provide entertaining rehearsal sessions to retain participants, whilst also incorporating the pedagogical tools to educate the cast in skills such as voice projection and movement, and ensure they can endure the rigours of performance on a professional stage, thus creating a high quality production (or product). This study investigates how the case study directors and practitioners approach this challenge.

The metaphor of scaffolding, most commonly found in theory relating to education, is defined by Boblett (2012) as "a system of temporary guidance offered to the learner by the teacher, jointly co-constructed, and then removed when the learner no longer needs it" (p.1). Simon (2010) applies the metaphor to arts participation activities, whereby scaffolding is about providing "supportive resources, tasks, and guidance upon which learners can build their confidence and abilities" (p.12). Simon (2010) states that some educators believe scaffolding should be removed in order for the participants to completely control their creative experience, but disagrees, because this means participants must also be mediators. It requires them to first know exactly what they want to create, then decide whether or not what they have produced is of what they perceive to be a high standard. Rather, Simon (2010) argues that participants respond well to constraints and that "The best participatory experiences are

not wide open. They are scaffolded to help people feel comfortable engaging in the activity. There are many ways to scaffold experiences without prescribing the result” (p.13). Furthermore, Simon (2010) also highlights that scaffolding the development of participation initiatives also applies to staff who may need guidance on understanding the project’s vision and delivering results. There is a gap in the theory on the process of large-scale Pro-Am theatre and I will consider the utility of this metaphor in describing the Pro-Am theatre process.

As stipulated by public cultural policy, a principal objective of SPTOs is to create outreach projects which are inclusive. The case study Pro-Am projects are open to amateur participants with no theatrical experience or training, and one of them is intergenerational. As Gardner (2016a) puts it: “innovative theatre often has community involvement at its heart”. The process of transforming a disparate set of individual participants, ranging in age from teenagers to octogenarians, into a homogenous theatre company can be complex, as a 2013 study into intergenerational theatre shows: "We explore our ideas through theatre exercises and devise an original piece rooted in what we have learned from one another. Rehearsals are an ensemble learning process" (Gildin et al, 2013, p.150). This participant’s testimony suggests a large degree of responsibility and skill needed by the practitioners and facilitators, as they must provide a well-structured and fulfilling process and enable the participants to share experiences and work as an ensemble.

Mshengu-Kavanagh (1997) stresses the importance of ethics when creating ‘people’s theatre’, because, as previously mentioned, it requires a high degree of pastoral care. Bilton’s (2007) assessment of the tensions within the theatrical creative process is as follows: “The content of creative work, based on ideas and emotions, and the context, based on intensive, short-term projects, encourages high levels of emotional and intellectual commitment” (p.41). This implies the potential dangers of prescriptive funding policies promoting large-scale participation initiatives, which must be carefully and considerately managed, in all SPTOs. This is another justification for an in-depth study of the concept of Pro-Am theatre, to investigate processes and benchmark the key challenges and best practice.

2.3.2 Product

In arts management literature, the term ‘product’ is used in two ways. First, it describes the production created at the end of the process of auditions, workshops, production design and

rehearsals: "The theatre is fortunate in that it has an audience to tell it quickly and decisively whether or not the product is successful" (Dean and Carra, 2009, p.8). Second, a product can also mean a more abstract outcome from a theatrical process or production. In terms of theatre participation, Hughes, Stevenson, and Gershovich (2006) suggest that it is not only the creative process which motivates participants to engage with the art form, but that performing in front of an audience is a powerful thing: "The art of theatre is based on a reciprocal exchange between actor and spectator" (2006, p.85). In this study, 'product' also has a third application: to describe the development of the overall Pro-Am project (dramatic product innovation); "product innovation is the typical method for creating value in creative industries. So for organizations, careful management of value creation contributes substantially to success" (Troilo, 2015, p.225). Troilo (2015) also advocates that arts organisations should adopt a dual strategy of both 'disruptive' (seeking new markets) and 'incremental' (consolidating current relationships) innovations. This approach encourages an organisation to maintain an innovative edge whilst also mitigating risk: "Ideally, these innovations will open up growth opportunities for the future...with each component fuelling the other" (p.316).

When SPTOs adhere to the established model of producing professional theatre productions on their stages, for which tickets are sold to the public, the organisation is in control of the value creation process. However, as Troilo (2015) goes on to explain, when an organisation invites participants in to create new products, it relinquishes some of this control. This poses the two-sided question; why do organisations offer participants (or consumers) a degree of control over creating new products, and what motivates participants to put their time and energy into taking up the offer? Troilo (2015) states simply: "because this is where the world is heading" (p.233) and participants particularly appreciate the experiential value of collectively developing creative products. The prediction of the continued rise of participatory initiatives within the creative industries also highlights the timeliness of this study.

Not all Pro-Am theatre productions are devised using the real experiences of the amateurs as inspiration, but those that do offer participants the opportunity to influence artistic product at a professional level, which can be problematic, because with no script to work from, the facilitator has a responsibility to make a coherent production using the input of potentially many dozens of participants. There is theory to suggest that the Pro-Am product (production)

also has implications for theatre programming. In a study of German SPTOs, Boerner and Jobst (2011) note the complexities of programming, and the mutual interdependency of a theatre season's themes, play selection, casting, and chronological order. All this must be done whilst managing the expectations of a range of stakeholders including audiences, funding and policy bodies, and critics: "Conflicts exist among artistic excellence, entertainment and economic efficiency" (p.76). It is valuable to understand how the SPTO leaders and Pro-Am managers face these challenges, and discover who they perceive to be the key stakeholders in Pro-Am productions.

Lindgren and Packendorff (2007) argue that the project-based nature of theatre work is what makes participants build a sense of professional identity as they work together to stage a production on time and on budget. In interviewing workers at two contrasting professional theatre companies they found that "A quite usual story among the interviewees is that their work is actually a life-project for them, something they do to fulfil their dreams and potentials" (p.358). This study considers the importance placed on the 'product' of the Pro-Am production by the SPTOs.

Cashman (2003) advocates the importance of feedback and assessment when developing and marketing new projects in arts organisations, and evokes the Japanese philosophy of 'kaizen', which "considers all organisational activity as being cyclic and passing through a number of stages" (p.81). These four stages are essentially: *plan* what to do; *do* what has been planned; *check* the results of what was done; and *act* on conclusions to inform future plans. This study considers the ways in which the Pro-Am case study projects have incrementally developed and the significance of feedback and assessment.

Kelly (1990) concurs with Stebbins (1992) that public feedback can be a motivating factor in arts participation activities:

While practice and rehearsal are satisfying in themselves, there is a public offering in mind and the expectation of some positive evaluation of the performance. Serious artistic endeavour is an offering to others as well as an experience of intrinsic satisfaction. From this perspective, it is impossible to completely separate creation and appreciation in the arts (Kelly, 1990, p.237).

This observation is fundamental to this research. In order to fulfil the objectives it is imperative to explore which is a bigger motivation to participants and facilitators in Pro-Am

theatre work; a satisfying creative process or a high calibre end product. Both are important of course, but striking the balance between the two is crucial for managers.

Reactions to Pro-Am theatre work

This section presents examples of how some of the large-scale Pro-Am theatre projects of recent years have been received by theatre critics and journalists. Highlighting some of the critical reaction to the end product of Pro-Am work (the production), helps to frame the process and product debate and close the circle of the projects. A key factor in this debate is that critics do not see the process. It means nothing to them if they found the production to be poor, but everyone involved had a fulfilling experience creating it. Therefore in order for Pro-Am work to secure a platform and consequently build support and advocacy for funding, it seems evident that the end product must be able to stand up to the rigours of criticism.

In April 2011, National Theatre Wales, along with site-specific participatory theatre company Wildworks, staged a 21st century version of the biblical play "The Passion". Taking place over the Easter weekend and spanning seventy-two hours and a multitude of locations across the Welsh town of Port Talbot, the play starred award-winning actor Michael Sheen and a core cast of fifteen professionals, all local to Port Talbot, alongside amateur performers and local people, creating a full cast of one thousand. Thousands of people turned out to watch the play unfold across the weekend. Michael Sheen appeared on national television programmes to promote it and it was streamed live on the internet and reviewed nationally.

One review describes the overall experience of attending the production, rather than assessing the content of the play: "The size of the crowd gave force to each moment: I've never been in an audience where people have wept so unashamedly" (Clapp, 2011). The BBC website also gives a descriptive review of the spectacle of the production, which it could be argued does as much to advertise future productions of this nature to audiences as analysing the content and performances. In contrast, another critic and theatre commentator for The Guardian newspaper offers a more traditional theatrical review, giving it five stars and calling the production "transforming and uplifting" (Gardner, 2011c). The same critic wrote a further reflective piece about the play, claiming it was "72 hours in theatre heaven" and stating that "This epic production drew together the people of Port Talbot and explored myriad ways of delivering theatre – from Twitter to whispered rumour. Has it changed the shape of

participatory performance?" (Gardner, 2011b) In a subsequent article however Gardner (2011a) presents a more sobering view of theatre participation, recalling the shortcomings of a participatory theatre project in London some years ago which failed to engage with participants because the community and the theatre company had very different expectations of the project. Gardner uses the example of "The Passion" as a "gold standard" and claims that participatory theatre projects can have a profound impact on communities providing they are not 'parachuted in' and that experiences of challenges and best practice are shared:

Expertise is every bit as important as funding and will help ensure that the final piece has real artistic value, is genuinely welcomed by the community, is run along ethical lines and leaves a valuable legacy behind (Gardner, 2011a).

This echoes comments made in the introduction in relation to the motivation for each case study: the desire to create art 'with' people rather than 'at' them and to meaningfully engage with participants and the wider community through Pro-Am work. This is a dilemma which this research seeks to address. On the one hand, it could be argued that only those participants with a pre-existing interest in theatre will be attracted to the projects and have the required level of commitment. On the other hand, the need to secure funding could well mean that a project must prove its outreach credentials and its intention to introduce inexperienced participants to the benefits of arts participation. This adds another dimension to Pro-Am theatre projects: not only must they provide a satisfying process for participants and a high quality product for audiences, they also have a responsibility to the wider community in which they exist.

The Guardian's review of Pro-Am(A)'s 2011 inaugural production is enthusiastic. The reviewer gives the piece four stars and champions the professional production values, the play's bold themes, and the appeal of the play to audiences beyond those related to the cast. The reviewer even suggests that audience members who enjoyed the show and could relate to its themes might be encouraged to get involved with Pro-Am(A) and sign up for future productions.

The foundation for what would become Pro-Am(B) was first reported in the theatre industry press in 2008. It uses the testimony of the then artistic director of SPTO(B) to announce how the organisation wanted to improve the relationship between professional and amateur

theatre in Britain, to recognise and celebrate the powerful amateur theatre sector and to renegotiate the boundaries between amateurs who make theatre as a community and the 'specialist' professionals who make theatre for a living.

The conception of Pro-Am(B) was then reported in 2010 along with the endorsement from NODA and the lead producer's vision for the initiative, which was that theatre is an art form for all, and SPTO(B) wanted to share their resources through developing a meaningful relationship with amateur theatre. The fact that the project was heralded by renowned theatre industry publications, rather than being dismissed as just another outreach programme, demonstrates the ripple effect of Pro-Am work across the theatre industry and wider arts sector.

A 2012 review of one of the Pro-Am(B) productions gives a supportive appraisal of the project as a whole. It cites one of the amateur participants who states that the initiative offers people who love theatre but took a different path to that of professional actors and do not work in the industry "the chance to shine".

Supplementing the academic literature with some critical reaction to Pro-Am work helps to ensure relevance to practitioners and policy-makers, by highlighting the reaction to developments in the field.

2.3.3 Management of the space

One of the distinctive features of 'theatre' is that the name of the art form is also the name of the space in which the art form takes place, creating "a vital connection between physical space and the artistic communication" (McAuley, 2000, p.1). According to Conte and Langley (2007), the four basic elements of theatre and the performing arts are: a performer, some material, a space, and an audience. In this study, the concept of space is applied in two ways. First, there is the space of the professional stages which the Pro-Am participants inhabit. Second, there is the space of the SPTO buildings, which are accommodating large numbers of participants. Pro-Am theatre is an invitation to access the professional space (Hanna and Kammel, 2007). As "The Passion" and the productions created by both case studies show, this can also include outdoor or site-specific work, which is performed in non-traditional theatrical spaces. This study considers how the SPTOs are developing innovative practice to address these challenges.

The management of space is important to both process and product because large numbers of participants have to be logistically managed and the quality of their experience must also be managed during auditions, workshops, rehearsals and then performances:

Theatre buildings incorporate within themselves indications of the practices they are designed to house: the arrangement of the auditorium and the nature of the other social spaces in the building reveal a great deal about the theatregoing experience from the spectator's point of view (McAuley, 2000, p.37).

The study looks beyond the audience experience to consider the relationships between the participants of large-scale Pro-Am initiatives and the SPTO buildings.

Klaic (2012) suggests that outreach programmes are integral to a funded theatre organisation's core output and require complex strategies: "Theatres experiment with the structure of occasional complex events that fuse artistic experience, entertainment, socialisation, reflection and education" (p. 126). Whilst this explanation covers events which members of the public can attend as spectators, it could be argued that it also covers participation initiatives, as they are usually facilitated by the outreach or equivalent department of the SPTOs. Therefore it is insightful to view certain elements of the two case study models, such as the large-scale productions of Pro-Am(A) and the showcases of Pro-Am(B), as specially structured events which are created and managed by the SPTOs.

Klaic (2012) also asserts that "Nothing enhances sociability as much as the shared consumption of food" (p. 127). Klaic (2012) uses the example of a theatre company which invites audiences to stay behind and eat with the company after performances, rather than the commercial opportunity of feeding audiences before shows and in intervals, which many organisations exploit to generate revenue. The extent to which the provision and sharing of food within the professional space plays a role in the success of Pro-Am initiatives is considered.

There is a clear paucity of knowledge on how arts organisations manage large numbers of participants within their spaces, which is another gap this study can fill.

2.3.4 Marketing

Marketing products and services is about adding value and therefore generating profit, but marketing the arts presents different challenges: "arts and heritage are often less concerned with generating profit than with creating quality experiences" (Walmsley, 2014a, p.43). Arts

marketing should therefore “focus on the artistic experience as the core customer value” (Boorsma, 2006, p.73).

Kirchner, Marowski, and Ford (2007) claim that cuts to public funding and the competition for audiences’ attention posed by television and the internet present challenges and opportunities which necessitate a “market-centered, as well as an art-centered approach” (p.95). Schaffer Bacon (2007) also argues that “Arts organizations face tremendous competition for an individual’s attention” and therefore “delivering the organization’s message to the community and the individual is at the heart of marketing” (p.297). A Pro-Am project is what Kolb (2013) would define as a distinctive cultural offering, given the dual approach of selling the experience to participants (producers) and the shows to audiences (consumers).

Crealey (2003) argues that introducing innovative new products and services in the performing arts context is complex, but advises addressing the audience perceptions of risk and “using market information gathered at every opportunity to inform decisions” because “developing new performing arts products is a multi-stage process that must be actively managed” (pp.32-33). Voss, Montoya-Weiss and Voss (2006) highlight the complexities of integrating new product innovation within current product portfolios and suggest there must be strategic fit between the innovativeness and the marketplace. Hume, Mort, and Winzar (2007) state the importance of “understanding the drivers of return purchase” (p.135) in theatre organisations, and encourage managers to get feedback from consumers (audiences) regarding what makes them return to that theatre, then to use this to add value. This study therefore examines how SPTOs create Pro-Am projects which attract participants, and result in productions which align with the organisation’s main professional dramatic programme, appeal to current audiences, attract new audiences and potentially encourage audience members to become future participants. Strategic planning of Pro-Am initiatives might therefore consider customer acquisition, retention and conversion.

Terblanche (2004) argues that relationship marketing is integral to the success of performing arts organisations: “The emphasis in relationship marketing is on establishing and maintaining long-term relationships with a view to ensuring loyalty to the organisation” (p.9). The successful development of relationships with participants and audiences could be beneficial to the Pro-Am projects and the wider organisation: “These groups could potentially be used

as ‘value ambassadors’ to spread positive word of mouth about the impact theatre has on their lives” (Walmsley, 2013b, p.85).

Schaffer Bacon (2007) discusses the need for arts organisations to build participation initiatives as well as audiences in the 21st century, and evokes McCarthy and Jinnett’s (2001) framework. This recommends that, once an organisation has decided precisely what it means by ‘increase participation’, this can be done in three ways: *broadening* it, meaning trying to capture a share of the existing market and encourage people who enjoy the arts but are currently not participating; *deepening* it, meaning intensifying the experience and involvement for current participants; and *diversifying* it, meaning developing strategies to attract new markets comprising those who currently have no propensity for arts participation. Schaffer Bacon (2007) suggests each of these requires a different marketing strategy and that organisations cannot attempt all three simultaneously, but, by carefully combining programme development with marketing strategies “arts marketers can provide bridges to connect new audiences with opportunities for expression and enrichment” (p.299).

Bilton (2007) claims that what distinguishes the creative industries from other manufacturing industries is that they deal in ‘symbolic goods’. The value of plays, films and music, for example “is contained not in physical properties or even in intangible qualities but in symbolic meanings – ideas, images, emotions and experiences” (p.138). The value of these products and services is then subjectively determined by each consumer, and cannot be predicted by the producer: “It also places an emphasis on cultural consumption as the site where meaning and hence value is created – or recreated” (p.138).

Walmsley (2014b) states that although marketing and theatre share the commonality of a two-way communication process, the art form presents complex challenges for marketers:

the live, interactive nature of theatre, the mystique surrounding the creative process and the complex psychology behind the audience experience make theatre arguably one of the hardest products to market (p.375).

Walmsley (2014b) goes on to highlight the possibility that theatre-makers may reject marketing terms like ‘product’ and ‘consumption’ as being reductive and inappropriate for “something they perceive as experiential and sometimes almost even sacred” (p.376), and suggests employing epithets such as a ‘symbolic’, ‘intangible’ and ‘experiential’ to define the theatre product in marketing terms. This highlights the challenge for SPTOs of marketing Pro-

Am projects to participants and audiences as it is difficult to communicate the experience they will have and what it might mean to them.

Morgan (2014) emphasises the importance of arts marketing for non-profit arts organisations in facilitating “customer-value, artistic integrity and mission fulfilment” (p.96). Neelands et al (2015) state: “Opportunities to make amateur participation more visible should be encouraged by cultural organisations” (p.39). The marketing strategies used to attract participants and audiences to the case study initiatives are considered.

2.4 Summary: Micro environment

This chapter has reviewed the literature surrounding the micro environment of large-scale Pro-Am initiatives in SPTOs, and identified gaps in knowledge which the study will fill. Leadership, risk and innovation are the three pillars of the theoretical framework used to understand the organisational implications of this strategic direction. This is the first time they have been applied in this context and are not mutually exclusive, but overlap and collectively underpin the study. This inquiry explores how Pro-Am projects are created and developed, from the conception of the idea to the reaction to and assessment of the finished production; how the projects are appraised and adjustments made; which objectives the organisations have, whether these are met, and whether the SPTOs plan to sustain the concept.

Leadership

The study explores styles of leadership, with a view to understanding the implications for managers and practitioners and any trends which might suggest whether more organisations can and should replicate the case study Pro-Am models; the rationale behind the projects and the ways in which they are introduced and embedded in the organisations; the influence of artistic experience on the way people lead organisations, projects and productions; and the role of flagship organisations as agents of change in their development of large-scale Pro-Am initiatives.

Risk

There is a striking absence in the literature of the organisational perspective on risk in contemporary subsidised British theatre. The study considers the artistic risks of large-scale Pro-Am initiatives; the risk to SPTOs’ reputations of offering and not offering these

opportunities; how the organisations approach the operational and financial risks of making theatre with so many participants; and the perceived risks of the participants with a view to understanding how the organisations can mitigate them and encourage participants to commit to the projects.

Innovation

The study contributes to the understanding of the organisational perspective on innovation in SPTOs in terms of the approaches to the processes and products of Pro-Am theatre; the ways in which large numbers of participants are managed in the SPTO buildings; and how the initiatives are marketed to participants and audiences.

The central themes have been explained, and gaps in the knowledge identified. The next part of the literature review situates the study and develops the concept of Pro-Am theatre.

3 Literature review: Macro environment

This second chapter of the literature review explains the 'society' of the study. It begins by reflecting on the conceptual term 'culture', then defining the SPTO, and focussing on arguably the two most significant external factors affecting the strategic management decisions made within these organisations, policy and funding. The chapter then moves on to present the theatrical context and theory underpinning the Pro-Am theatre concept. Exploring the background in which large-scale Pro-Am initiatives within SPTOs exist contextualises the study and highlights its distinctiveness.

3.1 Reflecting on 'culture'

The word 'culture' is one of the most complex in the English language (Williams, 1976), but has two broad applications (Bennett, 1995). The first is the anthropological sense, used to describe customs or social behaviour. The second is the creative sense: "the product of intellectual, and particularly, artistic activity. It thus refers to music, drama, dance, painting, sculpture, literature, film, and so on. The list can never be exclusive" (Bennett, 1995, p.17). Jones (2009) highlights the importance of culture and creativity in our 'expressive lives', stating:

through culture we find our place in the world...the choices we make in relation to what culture we consume and what we create help us to connect with others who share our opinions, ideas and beliefs. Culture is also a space in which we generate new values and responses to the world around us (p.10).

As shown in the introduction, the DCMS collectively categorises 'arts and culture' as one sector of the creative industries. The value and benefits of arts and culture in the UK are a subject of continuous debate amongst policy-makers, funding bodies, practitioners and academics (Selwood, 2001). This is predominantly linked to the argument for continued public subsidy. According to Hewison and Holden (2011) value is "the reason why people choose to engage with culture" and benefits are "the reason why government, local authorities and other funders support it" (p.70). Hewison and Holden (2011) advise arts leaders to appreciate the different types of value and benefits of culture, which they define collectively as 'Cultural Value'. This is expressed as a collection of three terms: intrinsic, instrumental and institutional. The three points on the "Cultural Value Triangle" (Hewison and Holden, 2011, p.70) are not mutually exclusive but complementary, with individuals attaching varying levels

of importance to them. Each value is complex, requiring different language and measurement. According to Hewison and Holden (2011), *intrinsic value* is the integral or essential part of what makes an art form distinctive and the subjective effects on individuals; *instrumental value* is the use of culture as a tool to address a social issue or achieve a particular objective; and *institutional value* refers to the actions of cultural organisations, which suggests relationships between cultural organisations and the public can contribute to a well-functioning society.

3.1.1 An ecological approach

The debate surrounding the value and contribution of culture to society evokes parlance such as ‘the cultural economy’ which is defined by Anheier and Isar (2008) as “an economic system for the production, distribution and consumption of cultural goods and services through market as well as non-market mechanisms” (p.3). Pratt (2008) argues that ‘cultural economy’ is not the economy of culture, but the “set of socio-economic relations that enable cultural activity” (p.43). Holden (2015) rejects the concept of ‘cultural economy’ in favour of ‘cultural ecology’. This concept, also used by Markussen, Gadwa, Barbour and Beyers (2011), can offer a richer understanding of culture and its nonpecuniary values:

An ecological approach concentrates on relationships and patterns within the overall system, showing how careers develop, ideas transfer, money flows, and product and content move, to and fro, around and between the funded, homemade and commercial subsectors. Culture is an organism not a mechanism; it is much messier and more dynamic than linear models allow (Holden, 2015, p.2).

The model of the three subsectors, or spheres, which comprise cultural ecology was first proposed by Holden in 2008 and is elucidated in a 2015 report:

First there is the publicly funded sector, where the production or maximisation of public goods is assisted by support directly from the state or from philanthropists (where the state foregoes tax income). Next there is the commercial sector that operates through the marketplace. Here, while individual ‘products’ such as films or songs may fail the test of market viability, overall the sector manages without direct state support. Finally, there is the ‘homemade sector’, where people make culture for themselves and fund it themselves. This extends from traditional ‘amateur’ and voluntary activities such as am-dram and community choirs through to the uploading of self-produced music and images onto websites (Holden, 2015, p.2).

Holden (2015) recognises that ‘ecology’ is not singular, and within this framework of three spheres there are many smaller ecologies orbiting the broad arc of cultural activity in the UK.

For example, a town or city could have its own cultural ecology, or an art form such as theatre can be described as an ecology. Indeed, 'theatre ecology' is a term adopted by Harvie (2015) when appraising the effects of cuts to arts subsidy by the Conservative-led coalition government from 2010-2015. Harvie (2015) argues that England's theatre ecology has been damaged by cultural policies which reduced public infrastructure and encouraged private philanthropic giving.

The term 'theatre industry' is problematised by Hetherington (2015), who claims that the spectrum of British theatre productions is so expansive and the variety of performance spaces so vast, that:

There is no single operating paradigm, just as there is no single system within which manifold paradigms are constructed, but an undeniable range of operating constitutions, from individuals to large international companies, each of which encompasses a wide range of individual skills (p.8).

This study adopts this contemporary view by considering the position of large-scale participation initiatives in SPTOs within the UK's theatre ecology.

3.2 Subsidised professional theatre organisations (SPTOs)

Kolb (2013) claims that:

Cultural organizations should think of themselves as members of their communities. They should view their art as something they wish to share, rather than impose from above. For this reason instead of the word art, the word culture is used as it applies in a broad sense to all events or objects created by society to communicate cultural values (p.3).

In this sense, the SPTOs in this research can be classified as 'cultural organisations' because the Pro-Am initiatives they create are designed to make theatre *with* as well as *for* people. Yet, given that the term 'art' is often found to be used inconsistently, either alongside, synonymously, or as part of 'culture' (Mulcahy, 2006), and that 'arts management' is a more recognised scholarly term than 'culture management', the SPTOs in this study can also be called 'arts organisations'. Kolb (2013) suggests "Instead of the word institution, the word organization is used. An institution is a place, but organizations are groups of people" (p.3). It is also my view that the SPTOs exist primarily through the people who populate them and create their artistic output. Yet, given the significance of participants claiming the professional space and inhabiting the renowned buildings through the Pro-Am projects, it could also be

argued that the two case study SPTOs can be defined as institutions. The following terms have been used to describe the two case study SPTOs; externally, through journalistic reports and industry publications; and internally, on websites, annual reports and other materials: (theatre) 'organisation', 'institution', 'building' 'complex', and 'company'. The term 'subsidised professional theatre organisation' emerged through the literature review process as the most appropriate definition for use in this research.

Dean (2002) defines the three types of professional theatre organisations as, "receiving/presenting theatres, producing theatres and production companies" (p.10). The following figure illustrates the types of theatre organisations which feature in this investigation, according to Dean's (2002) classification:

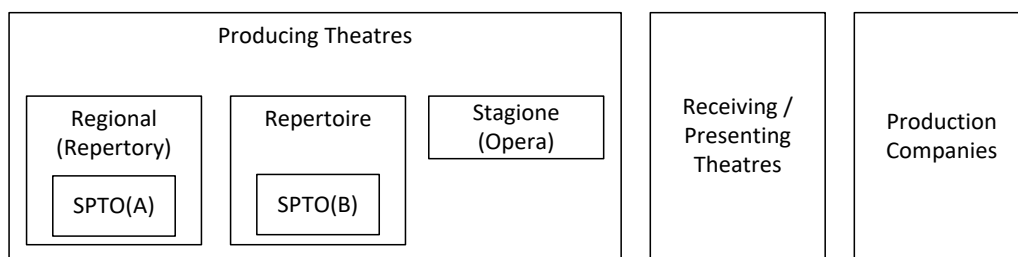


Figure 3: Types of professional theatre organisation. (Adapted from Dean, 2002, pp.10-14).

Dean (2002) explains the differences between each type of organisation at length, but this study focuses on producing theatres in the subsidised sector. These are usually building-based and create their own productions. Commercial receiving/presenting theatres, on the other hand, take in shows from production companies, and at times, producing theatres. The distinguishing factors between regional and repertoire houses, suggested by Dean (2002, p.12-13) are:

“Repertory theatres:

- “Are usually known as ‘regional reps’.
- Have a season of plays in which productions are staged one after another.
- Perform each production every night (except Sundays) for a limited run, often four weeks.
- Start rehearsing the next production as soon as the previous one has opened.
- Encourage audiences to ‘subscribe’ to the season, and to see all the productions over the course of several months.
- May also operate a Studio Theatre.

Repertoire houses:

- Mostly comprise the big national companies.
- Have seasons of plays in which a number of productions alternate with each other.
- Have each production in the repertoire for a number of months, but perform it for only a few days at a time.
- Rehearse several productions at a once, and open them in fairly quick succession.
- Encourage audiences to see a number of productions in a short period of time (this is particularly attractive to tourists).
- Usually have more than one auditorium.”

Dean’s (2002) descriptions give a helpful overview, but I would argue that some of the points are outdated in today’s theatre sector. Even the terms ‘regional rep’ and ‘repertoire house’ are not commonly used. A regional rep is more likely to be called a regional theatre and a repertoire house such as the National Theatre is more likely to be referred to as a national theatre company or organisation. To give another example, regional theatres are unlikely to have the resources to continually go into production for one show as soon as another has opened.

Klaic (2012) highlights the pressure on subsidised theatres to justify their support from the public purse. There are numerous obligations, such as revitalising classic plays, supporting new writing and emerging artists, staging work in a range of styles, developing and retaining audiences, and offering engagement opportunities for young and old, underprivileged groups and ethnic minorities. In other words, SPTOs should be “hubs of sociability, networking, leisure, debate and work” (Klaic, 2012, p.176).

SPTOs are challenged with creating high quality artistic work which will attract audiences, just as commercial theatres do. However, they must do so whilst also fulfilling a civic responsibility.

3.3 Policy context

Bennett (1995) defines cultural policy as:

the totality of measures adopted by both central and local government to support or regulate the different elements of this sector. As such, cultural policy (or its absence) has a significant influence on the production and distribution of words, images and sounds with which we make sense of the world (p.18).

Government intervention in the arts began with censorship. The Patent Theatres Act of 1660 restricted dramatic performance to just two theatres, approved by parliament. This remained

in force for two hundred years, although the number of theatres grew slowly. In another act of theatrical censorship, from 1737 all new play scripts had to be submitted to the government for the approval of a senior law officer, with the power to censor. This system was finally abolished in 1968 (Bennett, 1995).

The origin of UK public policy relating to the arts and cultural provision can be found in the 19th century, when government censorship gradually began turning into support. The Museum Act of 1845 and the Public Libraries Act of 1850 are the founding legislative statues of most local and national government arts policy in the UK (Mulgan and Worpole, 1986). Roberts (2004) maintains that in the UK the arts are "the only leisure industry where the state is the principal provider" (p.182). However, due to social and economic ramifications the motives for investments are far more complex than in the commercial sector, with Veal (2002) warning that the legislative agendas of different governments can drastically affect arts policy.

3.3.1 Arts Council England (ACE)

ACE is the UK's biggest arts funder and is the agency used to assess current cultural policy linked to Pro-Am theatre. It is the agency charged with distributing public funds allocated to the arts in England by central government's DCMS and from the National Lottery. In 2010 ACE published its "Achieving Great Art for Everyone" report, which is a ten year strategic framework for the arts. In terms of what the future might hold for cultural policy, 2016 sees the launch of the first White Paper on the arts since 1965.

The objectives of the first royal charter for a national arts council in the 1940s were to support development of elite arts and also encourage public arts participation (Coalter, Long and Duffield, 1986). Over the years, debate has raged over which of these aims deserves the greater concentration of resources and which contributes most to the country's cultural richness and diversity. Hewison (1997) and Carey (2005) are scathing in their assessments that the arts council in all its guises has harboured an agenda that is preoccupied with London-centric elite art, with policies historically focussed on the "professional art establishment's ownership of cultural activity" (Carey, 2005, p.157). ACE continues to insist that its core dual purpose still exists and engages in periodical research projects which evaluate the impact of its investments. For example, launched in 2014, "Create" is an online journal run by ACE which explores perspectives on the value of arts and culture in the UK.

3.3.2 Policy and participation

Clements (2011) states, "creative participation in the arts is a complex and abstract concept that bridges the gap between cultural production and its consumption" (p18). Waters (1994) claims that there are two types of arts participation, active and passive. Passive participants are audience members, and active participants take part in an art form. However, I would argue that 'receptive' would be a more appropriate term for audience members. An individual can be both a performer and audience member on different occasions. Waters (1994) argues that active participants have a desire to improve, and so seek out classes or forums where they can develop their skills. This self-development in turn leads to "a greater appreciation of professional performances" (p.11). Waters (1994) also emphasises the collective experience, whereby active and passive participants are frequently motivated by the social element of their participation. In order to satisfy the increasing demand for arts participation, Pratt (2005) recommends a new infrastructure for offering engagement opportunities with the public, which are free at the point of exchange. Brown et al (2011) take this argument further:

We are in the midst of a seismic shift in cultural production, moving from a 'sit-back-and-be-told culture' to a 'making-and-doing-culture.' Active or participatory arts practices are emerging from the fringes of the Western cultural tradition to capture the collective imagination...This shift calls for a new equilibrium in the arts ecology and a new generation of arts leaders ready to accept, integrate and celebrate all forms of cultural practice (p.3).

Henley (2016) champions the value of artistic and cultural activity and of being creative: "we must always celebrate the intrinsic value of art as a human, emotional, transformative experience. That experience itself is a reason for investing in art and culture. But it's not the only reason" (p.15).

The transformative power of the arts has inspired many public policies, but quantifying the value of arts participation activities in rigorous research remains elusive. Even finding a common language to promote advocacy continues to be extensively debated (Jancovich, 2011; Belfiore and Bennett, 2010 and 2007; Clancy, 1997; Sayer, 1992). Existing literature on social inclusion, though important to the wider discussion on arts participation, is not central to this study's objectives. However, it is worthwhile mentioning some of the arguments surrounding social inclusion as a bed-rock to a changing cultural environment in policy terms. Clancy (1997) states that an 'instrumental' strand in cultural policy has developed over time

and that "changing patterns of cultural participation are clearly of interest both to policy-makers and to cultural managers" (p.224). This supports the contribution of this research, which documents the challenges and opportunities of large-scale Pro-Am theatre for managers and discusses policy implications.

Belfiore and Bennett (2010) state that the debate on social impact is inextricably linked with that of funding: "As a result, advocacy considerations have often encouraged an uncritical research agenda in this area" (Belfiore and Bennett, 2010, p.124). This is supported by Edgar (2012) who identifies the principal difficulty of quantifying the value of the arts is that the documented evidence on the social benefits comes through participation, and that although many subsidised organisations offer participatory projects "most public money still goes to subsidise people sitting or standing silently look at other people do things...or things they've done" (Edgar, 2012). This once again highlights the complexities of funding both excellence and access in the arts and of taking the needs of active participants and receptive audiences into account.

Madyaningrum and Sonn (2011) discuss the reliance on community arts participation as a "community development strategy" (p.358) and highlight the debates over the research attention this has received, because research agendas tend to support the idea that there are positive outcomes from arts participation, but cannot explain how these outcomes occur. In seeking to understand the meaning of community arts participation from the participant's perspective, Madyaningrum and Sonn (2011) suggest that it can promote "the creation of new relationships and new stories about community" (p.358), but that the process of bringing diverse cultural and generational groups together held greater meaning for the participants than the resulting story that they told. In other words, process was deemed of greater significance than product.

There is continuing top-down emphasis on funded regional and national theatre organisations to create meaningful engagement opportunities for the public, even on decreasing budgets. Reports such as ACE's "Theatre Assessment" (2009) and "Achieving Great Art for Everyone" (2010) stipulate that theatres expanding their remit beyond producing plays benefits communities and makes organisations more vibrant.

The Chair of the 2015 Warwick Commission on cultural value asserts that a sea-change is needed to provide greater access to, and recognition of, creative activity across Britain:

government and the cultural and creative industries need to take a united and coherent approach that guarantees equal access for everyone and the opportunity to lead a creative life. There are barriers and inequalities in Britain today that prevent this from being a universal human right. This is bad for business and bad for society (Heywood, 2015, p.8).

In the Warwick Commission report (2015), Neelands et al recommend a new model for arts funding in the UK in order to prioritise access to arts engagement, which should give equal attention to amateur creativity and prestigious organisations. This idea has been previously proposed by cultural policy commentators such as Hewison (2014) and Holden, Kieffer, Newbiggin and Wright (2012), who argue “ACE should be supporting those companies, and only those companies that work with and are respected by their communities, not just audiences”. This study considers the potential for SPTOs to help square the circle of excellence and access through Pro-Am projects.

Broadly speaking, the current structure of cultural policy governing participation in UK theatre, from conception to delivery: starts at the DCMS, then is filtered down through ACE and the local councils to the SPTOs (with bodies such as the professional performers and creative practitioners’ union Equity acting as intermediary), and finally reaches the participants.

It could be argued that each stakeholder has a particular agenda, based on criteria such as funding constraints and organisational objectives. As such, the policy is mediated across all stages, being shaped at each point. So, by the time it arrives at the participants, the policy may be quite changed from the original top-down plan. There is an argument for placing the participants at the top rather than the bottom of the model, so that their motivations are the inspiration for policies which concern their engagement.

Other bodies acting as intermediaries between cultural policy governing amateur arts and the work taking place at grassroots level include the Third Sector Research Centre and Voluntary Arts. Both of these operate autonomously, free of a government agenda but reacting to it, and with the public as their main interest. In 2011, the research-led Third Sector Research Centre published a working paper entitled “The role of grassroots arts activities in

communities: a scoping study” (Ramsden, Milling, Phillimore, McCabe, Fyfe and Simpson, 2011). The paper was the culmination of research undertaken in 2009-10 to “identify the current state of knowledge on small, below the radar, community groups and activities” (p.1) and it highlights the lack of research into the contribution grassroots or amateur arts organisations make in communities. This gap in knowledge is substantial given that there are an estimated 49,000 such groups in England (Dodd et al, 2008). The study found that “Much of the literature from amateur arts organisations and independent reviews of the sector points to the importance of amateur arts’ contribution and its simultaneous invisibility in relation to the public face of the arts, funding bodies and other government arts advocacy organisations” (p.33).

Voluntary Arts also carries out research and advises on policy but predominantly offers practical advice on joining and running amateur arts groups, and is a uniting body for ‘bottom-up’ agencies representing amateur arts across the country, such as the aforementioned NODA. In a paper written for “Taking Part”, a 2010 conference debating UK arts participation, Voluntary Arts chief executive Robin Simpson said “The amateur arts sector contributes significantly to community cohesion, local pride and identity, health and wellbeing and many other aspects of strong communities but these are unplanned by-products of the artistic activity” (p.7). Simpson (2010) goes on to state that because amateur arts groups are formed by like-minded people, driven by a passionate commitment to their art form, the groups can sometimes be insular and not as inclusive as they could be. This evokes Tomlinson’s (1993) theory on ‘culture of commitment’ which states that participants are collectively galvanised by their passion for the art form and as a result “voluntary groups may represent not just the individual's right to organize collective activity, but also the ways in which groups can exclude and disenfranchise individuals” (Tomlinson, 1993, p.7). Opportunities can therefore be missed for artistic collaboration or for these groups to make positive contributions to their wider communities. In addition to this, Simpson (2010) argues that the:

organic network of 200 bottom-up infrastructure organisations gives the amateur arts sector a resilience and vibrancy. The drawbacks are that it can seem a very complicated and illogical structure which makes it difficult for Government and its agencies to engage with amateur arts (p.3).

This research considers whether Pro-Am initiatives and the potential changes to cultural policy they may inspire could help recognise the amateur contribution to theatre in the UK.

Despite my theatrical background and position of support for arts participation activities, this research engages critically with the concept of Pro-Am theatre. Cultural policy agendas have created a society which promotes engagement. However, this research also considers the potential for elitism (Jancovich and Bianchini 2013; Boland, 2007) and whether Pro-Am initiatives are creating a niche of the talented committed amateur, given that initial policy creates an environment where participation is possible but the organisations mediate who can participate and how. As Matarasso (2012) puts it: “Art does not need protecting from untalented practitioners: it can look after itself. But untalented performers might need protecting from their more skilled peers who have an interest in controlling who is and who is not able to take part” (p.81).

3.4 Funding context

The debate over the value of public subsidy of the arts has raged for many years in the UK. Hetherington (2015) evokes the Oxford English Dictionary’s definition of subsidy as a “sum of money granted by the state or a public body to help an industry or business keep the price of a commodity or service low” but adds that in theatre’s case consideration should also be given to why the government should wish to intervene: “In the context of theatre, subsidy is predicated on there being public benefits; that is to say, benefits for those who do not attend as well as those who do” (Hetherington, 2015, p.16). This means that rather than merely keeping ticket prices affordable for audiences, subsidised theatre makes a wider contribution to the arts and to society.

A 2015 appraisal of subsidised professional theatre entitled in the UK entitled “Theatre Matters” shows:

- There are 180 subsidised theatres in the UK.
- UK theatre is the least subsidised in Europe, yet shows significant return on investment and has continued to perform well in a challenging financial climate.
- Football may be the national sport, but each year more people attend UK theatres than all Premier League, Football League and Scottish Premier League matches combined.
- For every ticket sold at the 180 subsidised theatres, support came from the following areas:

Earned income	59%
Arts Council subsidy	25%
Sponsorship and funding	12%

Local Authority subsidy	3%
Other public subsidy	1%

Public subsidy is said to be necessary for constant renewal and artistic freedom, rather than recreating standard products. While there are many areas of the arts and cultural sector which thrive without subsidy, such as music, others need support to be innovative and creative (Smith, 1998). The principal argument in favour of subsidy is that it costs very little and the benefits, whilst unquantifiable, are widely accepted as vast and deep: “subsidies provide advance capital to the organisation enabling productions to be mounted, give the public greater choice at affordable prices, and provide an excellent return on investment” (Waters, 1994, p.126). Subsidy also allows for the training of arts practitioners and facilitators who then fluctuate between the subsidised and commercial sectors.

“Subsidy does appear to be highly effective at facilitating a wide range of theatre by enabling risk, providing support for the maintenance of the industry’s infrastructure, and leveraging large amounts of private sector finance” (Hetherington, 2015, p.70). Gordon (2016) claims that the instrumental and intrinsic value of the arts are complementary purposes not competing ones, which should be celebrated.

McGuigan (1996) claims that the cultural industry is a manufacturing industry like any other, and public funding should therefore be viewed as investment rather than subsidy. This was echoed in a pilot interview conducted for this research, when an experienced arts practitioner in the public sector voiced the opinion that the arts sector could be viewed as one of the last true manufacturing industries remaining in the UK, because it can turn relatively small investments into significant economic profits and social benefits. In fact, the chief executive of ACE at the time of writing, Darren Henley, personally rejects the word ‘subsidy’: “The Arts Council doesn’t use public money to subsidise art and culture – it invests public money for the benefit of all the public” (Henley, 2016, p.17). This study considers whether large-scale Pro-Am initiatives within SPTOs can be viewed as an investment in the future of arts participation in the UK.

In recent years, in the light of significant cuts to arts funding, the debate on the value of subsidised arts and culture in the UK has raged more strongly than ever. Notable examples include:

1. The independent report “Rebalancing Our Cultural Capital” (Stark, Gordon and Powell, 2013) advocates a remodelling of current cultural policy in England. Stark et al (2013) recognise there are no prospects for an increase in public subsidy, but suggest that current provision could be re-evaluated, claiming that although London should retain its position as a global leader in creative production, it is unhealthy for the cultural ecology of the country when the combined DCMS and ACE funding in 2012-13 equated to £69.00 per head in London, compared to an average of £4.58 per head in the rest of England. ACE refutes these figures, claiming that its ten-year strategy “Great Art and Culture for Everybody” is addressing many of the concerns raised, that local councils are in fact the biggest funder of the arts in the UK (around £720 million annually) and that the ACE resources channelled to London are not draining the rest of England as the Stark et al (2013) report claims. (ACE, 2013).
2. “My Theatre Matters” was launched in 2013 by Equity; theatre industry publication The Stage; and the UK’s leading membership organisation for professional involvement in theatre and the performing arts, UK Theatre. The campaign aims to support theatres in encouraging the public to contact their local government representative voicing how much they value the council’s support of their local venue, then develop a database of members to further harness and mobilise support for a continued commitment to theatre funding at a national level. At the time of writing the campaign has 37,000 members.
3. “What Next?” is a movement formed in 2012 by arts professionals across the UK to champion the value of the arts. There are weekly meetings of ‘chapters’ all over the country (over 30 at the time of writing). The idea is to mobilise the public to make the case for arts subsidy, as well as prominent arts professionals, because governments are more likely to listen to voters than arts professionals. Its objective is to be a catalyst for change. One of the founders states:

In a sense what we’re doing is what everyone says don’t do: we’re reinventing the wheel. We’re saying let’s do the simple thing, let’s make connections. For example: between the world of publically supported arts and culture and the commercial world. How do both of these connect to the millions for whom making art of a thousand different kinds is a passion – though not a profession? (Lan, 2013, p.19).

4. Equity's "Stop Arts Cuts" campaign (2016) claims every pound from the public purse invested in the arts generates anywhere between two and seven pounds in return, depending on the art form.

These examples show that despite the strain on public funding, the value of the arts and culture to society continues to be championed.

Klaic (2012) claims that each subsidised theatre should embrace its own character and distinctiveness, rather than try to emulate the practices of commercial counterparts, and "create rich educational, discursive and social opportunities for the public around its productions" (p.xi). However, Klaic (2012) also warns that subsidised organisations should not expect to be automatically entitled to subsidy on the basis of a high quality artistic output and revered history, but rather "public subsidies should be allocated on the basis of firm criteria that go beyond artistic excellence, in a tough but fair competition" (p.xi). This study considers whether the type of Pro-Am work being examined should be a funding requirement for SPTOs and therefore be formally recognised within public cultural policy regarding arts participation.

3.4.1 Local council funding

The role of local government in arts funding is significant, accounting for greater expenditure than ACE. Arts managers can often spend more time managing the relationship with their local council, convincing them of their organisation's value, than they dedicate to their national funding application (Gray, 2000). The main motivation for investing locally in art and culture is the economic potential. A report by the Local Government Association suggests this motivation is divided into five key strands: visitor attraction; job creation and skills development; attracting and retaining businesses; revitalising and regenerating places; and developing artistic talent of the future (Local Government Association, 2013).

Arts, culture and heritage funding are not statutory but discretionary services, and with increased pressure on budgets, local arts funding has reduced dramatically in recent years. The "50p for the Arts" campaign, launched by the lobbying group National Campaign for the Arts in 2014 claims that for every £1 of local government expenditure, less than half a penny goes to the arts and culture, and like the "My Theatre Matters" campaign, mobilises the

power of voters to contact their locally elected councillors and express their support for continued and increased arts funding (50p for the Arts, 2016).

3.4.2 Why subsidise?

Why do we need subsidy if we have commercial theatre? An audience member can walk into a foyer and not necessarily know the difference. The principal argument against subsidy, as highlighted by Bennett (1994) and Waters (1994) is that “if artists and organisations offered their goods and services on the open market, supply would soon be matched to demand” (p.119) and that art forms found to be out of touch with the public should not be artificially sustained. In other words, subsidy should not be a response to market failure. However, Waters (1994) counters this with the argument that the arts can be viewed as a social service, and that the minimal amount per head which is spent on arts, museums and heritage “would make little difference to individual incomes, but collective action achieves what the individual cannot” (p. 119). Waters (1994) suggests that critics of arts subsidy also argue that it covers shortfalls in income and so effectively supports ineffectual management. Waters (1994) refutes this by stating that subsidised organisations have become better at generating their own income, but does concede however that “in the anxiety to chase subsidies, sponsorship and self-generated income, and administer funds, extra layers of management have been created; these undoubtedly increase expenses” (p.122).

Hetherington (2015) also notes that the disadvantages of subsidy are “its availability, limited supply, restricted purposes and managerial distance from market realities. Its strengths lie in the provision of comparative operational security, the breadth of work it enables (including experimentation and ‘super-requirements’), and how it supports the market infrastructure” (p70).

3.4.3 Charitable trusts and foundations

The ‘three-legged stool’ of funding, comprising subsidy, box-office, and earned income and sponsorship has been updated with a fourth ‘leg’, charitable trusts and foundations (CTFs). Offering public participation initiatives can open up this funding stream for SPTOs. CTFs are altruistic grant-making organisations set up by an individual or company with the purpose of funding worthy causes (Freakley and Sutton, 1996). There are 900 endowed CTFs in England and Wales. They make up 1% of all registered charities. With collective assets of £48.5bn – nearly half the voluntary sector assets of the UK as a whole - they are collectively responsible

for £2.3bn of charitable spending each year; 4.8% of their combined assets (Jenkins, 2012, p.4). Beneficiaries are determined according to each CTF's own governing principles. Jenkins (2012) states that CTFs "currently face the twin pressures of lower investment returns and higher demands from their beneficiaries as public funding shrinks" (p.3). Applications for grants therefore require meticulous projection details, not only in terms of operation costs, but also the potential impact of a project. However, CTFs can provide SPTOs with the opportunity to stage ambitious projects which their public subsidy does not cover directly. The chief executive of one of the biggest CTFs in the UK states:

The role of the charitable foundations is changing in the context of a rapidly changing public sector environment...an emphasis we are able to place on audience and reach, for example, in some of the social justice work we do. It sits outside that government piece, and there's a degree of independence in foundation work that allows us to do that. Foundations on their own wouldn't be able to step in, but they have to be seen as part of the ecology now – we're still looking for core funding coming from local government or the Arts Council, and what we can do is add value around areas where there's a particular stress point (Sinclair, 2015, p.6).

Cuts to central and local government funding, a decrease in commercial sponsorship and an emphasis on private philanthropy suggest there may be an increasing reliance on the support of CTFs to launch ambitious new initiatives in arts organisations. The role of CTFs in the development of large-scale Pro-Am theatre in SPTOs is considered in this study.

3.5 Pro-Am theatre context

This section presents some definitions of what makes theatre unique, and discusses the distinct practices and processes at work. This provides some artistic context with which to develop an informed understanding of the complex challenges for managers facilitating theatre participation initiatives. The relationship between the amateur and the professional is then considered in various contexts with a view to underpinning the concept of Pro-Am theatre.

3.5.1 Theatre as a unique art form

The etymology of the word 'theatre' is Greek and translates roughly as 'a place for seeing'. Corry (1961) defines theatre as a complex fusion of arts, incorporating elements of "literature, poetry, music, dancing, painting, sculpture and architecture" (p.11). Like all art forms, it is dependent on contrast and full of conflict: "At its best it is part of the cultural heritage of

civilisation that has survived throughout the ages and will continue to survive as long as civilisation exists” (Corry, 1961, p.11).

Read (1995) considers the art form to be “an almost infinitely redefinable arrangement of human expressions which are conscious, physical, verbal and witnessed” (p.ix). Read also claims that “theatre is not one thing it is many, and its practice demands the reinvention of criticism that grows in and around it” (p.ix). These definitions suggest the complexity of investigating initiatives related to theatre, given that the art form encompasses so many meanings and is open to broad interpretation: “Drama works through a story framework, an enacted narrative which charts the transformation of people, events and ideas” (Taylor, 1996, p.271). Stevens (2013) defines theatre as “an interpretive art, the purpose of which is to communicate emotional response to life experience from one human mind to another” (p.1).

Brook (1968) claims that only an actor and an audience are essential in creating drama and that any space can be a stage. Pavis (1998) states that the “sequence of all theatre communication “begins with a play’s text or action, followed by the introduction of “an actor’s body, a stage, a spectator” (p.388). Pavis (1998) explains that a ‘stage’ does not necessarily mean a theatre building as theatrical activity can take place in myriad spaces. However, the spectator (or audience) cannot be eliminated entirely as the art form requires “an external gaze to be fulfilled” (p.388). A piece of theatre is not fully realised until it is opened up to an audience “ensuring that an element of unpredictability exists in every theatre event” (Medaille, 2010, p.328). Medaille (2010) also defines theatre as unique in the way it is socially produced as well as consumed. For example, there are artists (set designers) who “create products using traditional artistic materials, such as paint, wood, and fabric”, lighting designers whose “creative product consists of different types, colors and patterns of light”, and the actor who “uses her own body as an artistic canvas” (328). Medaille (2010) suggests that theatre is such a powerful art form because of its capacity to merge other art forms.

Theatre is the combination of the intimate and the epic. There can be an intimate closeness to the audience yet also, through direction and design, the capacity to open up the universe. McAuley (2000) comments on the ‘liveness’ of theatre, and that it only exists in the space between performer and audience. However, Trueman (2016) argues that a play can also be so slick and rehearsed to timed perfection, that the risk and liveness can sometimes feel lost and a production can feel “set; rehearsed, refined and running on repeat” (Trueman, 2016).

Theatre is also distinctive in that it affords the performer limitless opportunities to inhabit characters and situations. Acting is defined by Schechner (2002) as consisting of “focused, clearly marked, and tightly framed behaviors specifically designed for showing” (pp.146-7). Acting, performing, pretending to be, or behaving as if someone else, and changing one’s identity is a distinct kind of human practice. There are endless stories to be told. Practising the art form provides what Kear (2005) calls a “space of representation” (p.27). It can transcend language barriers and other social boundaries, and ultimately be used to communicate anything to anyone.

Theatre is based on the reciprocal exchange between performer and audience and this can be an incredibly intense and personal experience for both parties, which each individual might remember differently. A shared intimacy and common understanding can also develop between the creative team and cast during the planning and rehearsal period, which they then share with an audience. Then the production ends, people disperse and the theatrical product disappears (Lindgren and Packendorff, 2007). Unlike other art forms, there is no residual element of the creative theatrical process, such as a painting, song, book, or sculpture. Filmed plays exist mainly to document a particular production and cannot capture the essence of the live experience, although national cinematic screenings of popular productions is a growing trend (King, 2016; Wyver, 2015). There are so many variables, that a theatrical production can never truly be revisited, because the same play produced repeatedly will be different in many ways:

It is the repository of cultural memory, but, like the memory of each individual, it is also subject to continual adjustment and modification as the memory is recalled in new circumstances and contexts (Carlson, 2003, p.2).

The multiple temporalities in which people experience this ephemeral art form and the managerial challenges of creating an intangible product on a large-scale are the principal justifications for the selection of theatre as the research domain, and for the qualitative nature of the study.

Theatre is clearly a unique form of creative practice which poses constant challenges and opportunities for managers. The additional complexities of inviting amateur theatre participants into the professional domain will now be considered.

3.5.2 Amateurs and professionals

This section explores the topic of Pro-Am theatre by looking at amateur practice and considering some of the differences between amateurs and professionals in a range of areas.

Drummond (1990, p.4) proposes that the distinction between amateurs and professionals is based on five characteristics, emphasising that these are not mutually exclusive. They are: "Literal meanings", where the amateur is motivated by love and the professional by remuneration or vocation; "Attitudes", which means part-time dedication from the amateur and full-time from the professional; "Standards", in which the relatively low-skilled amateur is incompetent compared to the relatively highly-skilled professional; "Rewards", which for amateurs is recreation and for professionals is a livelihood; and "Status" which shows a reversal over time, because in the 19th century an amateur in the arts or sports had a high status compared with the lowly professional actor or sportsman, but the modern perspective gives higher status to the professional. Scholars such as Cochrane (2001) and Nicholson (2015) argue that in a theatre context, amateurs can in fact be highly skilled and have an attitude to their theatre-making which makes them as dedicated as professionals, even if they also have a full-time job outside of the art form.

Hutchinson and Feist (1991) claim that "The amateur arts are intertwined and interdependent", and state "rather than a clear amateur/professional divide, there is a complex amateur/professional continuum or spectrum of ambition, accomplishment and activity" (p.xiii) and argue that amateur arts "tend to be a more integral part of everyday life than professional performances" (p.xv). Hutchinson and Feist (1991) present a framework for this amateur-professional continuum, and state that practitioners of the arts may place themselves at different points on the spectrum at different times in their lives.

Freidson's (2001) book on the notions of professionalism barely mentions the professional in relation to the amateur, but does claim that one of the implications of the term amateur is that, "people who do not devote all their working time to performing a particular task or set of tasks cannot develop the proficiency to produce work of quality equal to those who do" (p.110). Freidson elaborates that this characteristic is not clear cut, as someone who is professionally trained and qualified would automatically be considered to be more of a specialist than someone who has a great deal of experience but lacks training.

Brooks (2002) argues that "the connections between the professional and amateur arts worlds are not particularly well understood" (p.13) which reinforces the need for further research in the field. Brooks (2002) considers the classification of amateurs and professionals, claiming that "compensation in the arts is often largely nonpecuniary" (p.5) and that "the only technical distinction between amateurs and professionals is that of financial compensation" (p.7). This is echoed by Drummond (1990) and Chamberlain (2004) who states "*Amateurs* are people who love what they are doing. *Pros* are people who get paid for doing it" (p.123). The theatre industry is full of inconsistencies which contradict this statement, such as the many professional actors who take unpaid work. Amateurs and professionals can both feel they have a 'calling' and be equally passionate in their endeavours, in a variety of fields (Edwards, 2014). Drummond (1990) and Stebbins (2014) also argue that all professionals start as amateurs in one way or another; for example, students could be viewed as 'pre-professional' amateurs, and there can be part-time professionals as well as amateurs who have professional standards and qualities.

Rojek (2010) claims that "professionalization" is the "codification of training and practices" (p.97) which distinguishes amateurs from professionals. It usually involves a body of peers setting up a standard of practice to which professionals are held to account:

Professionalization is a common strategy for distinguishing professional practitioners from amateurs. As such, it carries higher honorific value in society, greater political influence and more economic rewards (p.97).

The link between the professional and amateur sectors is often viewed from the perspective that the professional contingent of a particular art form set the standards, which the amateur contingent then seek to emulate and use to measure their work, before transmitting it to local neighbourhoods. However, as argued by Taylor (2008) and Howard-Spink (2011), these sectors are of equal importance within an ecology of artistic activity and should be viewed more as formal and informal practice.

Stebbins (1992) calls amateurs the "marginal men and women of leisure" (p.8). Kelly (1990) reflects on what can be a fine line for the amateur in terms of how they view their own individual level of participation in a leisure activity, stating that the 'modern amateur' "participates in highly disciplined and systemized ways." For example, the amateur performer who "recognises that this non-professional engagement is quite central to his or her pattern

of life” might actually define his or herself as an actor who also happens to hold down a separate full-time job. According to Kelly (1990) “The discipline and the participation take precedence in scheduling, allocating scarce resources and personal identity” (p.237), meaning the person cannot separate the self from the actor.

3.5.3 Amateur theatre

The debate on arts subsidy often centres around access to the arts through consumption, rather than production, action or participation “Yet participation in performance is accessible to any group of people willing to come together to mime, sing, dance or rehearse and act a scripted play, whether in a private (home) or public (village hall) venue” (Pearson and Davies, 2005, p.143). Amateurism in the worlds of music, sport and other leisure activities is widely researched, yet the motivations, experiences, and contributions of amateurs in the arts are barely recognised theoretically. There is a distinct lack of literature available on amateur theatre, its relationship to professional theatre, the understanding of differences between amateur and professional performers, and particularly on how professional theatres and other arts organisations engage with non-professional theatre-makers, whether individually or through the amateur theatre sector.

Amateur creative activity is often marginalised because people do it in their spare time, yet the ‘homemade sphere’ (Holden, 2015) makes a significant contribution to the UK’s cultural ecology. In a 2008 report, (which as Neelands et al (2015) highlight is “to date still the most comprehensive set of statistics on voluntary arts activity” (p.36)) Dodd, Graves and Taws state there are over 9.5 million people taking part in amateur arts groups across England, and the sector is worth more than £500 million per year, all of which is self-generated income. Amateur theatre companies stage around 92,000 performances a year, reaching an estimated annual audience of 21 million.

Dean (2002) defines amateur theatre as ranging from a group of friends staging one production to a hundred year old company with hundreds of members and its own theatre premises, which stages a several productions a year. Amateur theatre members may share job titles and responsibilities with their professional counterparts, with “the only difference being that they are unpaid” (Dean, 2002, p.10). Dean (2002) goes on to state:

members may care to study how professional theatre operates and apply it to their own organisation. The most important thing, in amateur as in professional theatre, is that everyone should know where their responsibilities begin and end, and have the knowledge, skills and support to carry them out (p.10).

The word "amateur" comes from the Latin 'amare', meaning simply 'to love', and it could be argued that theatre as we now know it was born out of groups of people telling stories and performing for each other. Yet the definition of "amateurish" is "lacking professional skill or knowledge" (Collins English Dictionary, 1994, p.46). Cochrane (2001 and 2011) claims that the divide between the amateur and professional theatre sectors was caused by the Council for the Encouragement of Music and the Arts, the governing body from which the original Arts Council model was derived. Cochrane (2001) states that in the 1950s the thriving amateur arts were seen as a threat to professional creativity and the decision was taken to use the limited government funds available to support professional artistic development, ostracising amateur creativity and labelling it inferior.

Nicholson (2015) argues that pejorative connotations of the word amateur particularly affect theatre: "it would be unusual to describe a band as 'amateur' and amateur gardening and craft activities are often encouraged rather than derided" (p.265). Nicholson (2015) goes on to highlight the lack of scholarly research into amateur theatre practice, even though "The twenty-first century is challenging old binaries between professionals and amateurs, conceptually, artistically and economically" (p.265). The marginalisation of the study of amateur creative activity is further supported by Knott (2015).

This is echoed by Gardner (2016a) who calls for greater recognition of amateur theatre practice as a training ground for professionals and in the role it can play in communities, and evokes Matarasso's (2016) assertion that "We become artists in the act of creating art, not because we have studied or been paid". Gardner (2016a) argues that the increasing appetite for participation opportunities suggests "It is clear that old demarcations or notions of what is professional and amateur no longer hold and that means that the theatre industry will have to adjust accordingly." This study considers the connotations of the terms 'amateur' and 'professional' within the contemporary Pro-Am theatre context.

In relation to the way audiences react to amateur work, Hill (2014) notes:

While the quality of amateur performances is more likely to be considered 'unreliable' than professional theatre, there is a feeling that it can represent better value for money: people are willing to pay more for good experiences, but are upset by high fees and ticket costs for poor commercial work (Hill, 2014).

Edelman and Šorli (2015) examine the values held by theatre and dance audiences and consider whether these differ in the subsidised, amateur and commercial sectors. 1800 spectators were surveyed across the Tyneside region, and the findings are insightful for this research:

the main value of amateur theatre seems to have been attending to the work of a person who is doing the job of an artistic professional. There is a sense of being impressed at the level of work the performers are putting in. One focus group member explained that, in a commercial or subsidised context, a certain level of professionalism on the performer's part was expected and thus not really interesting. But for amateurs, it was different. "I find it amazing that people who have other things going on in their lives – it's not their main job – can remember all those words", they said. This seems to indicate that audiences are able to share performers' understanding that, while amateur performance is self-evidently different from its professional cousin, this does not make it inferior to it (Edelman and Šorli, 2015, p.241).

Although this study does not focus explicitly on audience development, the reactions from audiences to the Pro-Am productions will be gauged.

A 2004 ACE report acknowledges and encourages a blurring of boundaries between what is considered 'amateur' and 'professional'. It evidences professional playwrights collaborating with amateur companies, to develop their work technically, and inspire its themes. The report concludes:

It is only with the further breaking down of assumptions around how work for the stage is made by people for other people that different constituent elements along the amateur/professional continuum can work together more systematically (p.60).

Therefore there are links between amateur and professional theatre-makers developing in the 21st century, but they are under-researched, which highlights another contribution of this study.

Exploring the term 'Pro-Am'

The dearth of literature on the connection between amateur and professional theatre has led to a journey into a variety of fields to understand some of the ways in which amateur and

professional relationships are defined. These include sports, sciences, computing and entrepreneurship.

Friedland and Kim (2009) use the term 'Pro-Am' in the field of 'citizen journalism'. There are a number of Pro-Am models within this context of online journalistic reporting, which are designed to "maintain journalistic quality while keeping entrance barriers low" (p.301). Nilsson and Wadbring (2015) discuss the influx of amateur images of global events into contemporary news reporting. These authors' findings suggest that gatekeeping practices limit the impact of these images and maintain an emphasis on professional photography.

A collaborative interpretation of Pro-Am in the sporting arena is the Professional Golfers Association's (PGA) annual "PGA National Pro-Am Championship". It is billed as the largest Pro-Am in Europe and has involved over one million amateur golfers since its conception in the late 1970s. In 2015 the championship attracted entries from over one thousand amateur clubs with 100,000 people taking part across sixteen regional finals (PGA website, 2016). In this context, amateurs play with and against professionals. The professionals are offered the chance of remuneration. The amateurs, in contrast, are offered the chance to compete, both with the professionals and with each other, along with the opportunity to play on prestigious courses.

The field of astronomy has a long history of professional and amateur collaboration. Boyd (2011) argues that the external pursuits of amateurs in other professional realms enable them to "bring a range of skills to their astronomical activities". Boyd goes on to state, "pro-am relationships can be very motivational and give a strong sense of purpose which leads to enhanced enjoyment and satisfaction" and concludes with the observation of an astronomy professor and seasoned Pro-Am collaborator that "The sum total of ingenuity and energy among the world's amateur astronomers vastly exceeds that of the professionals" (p.89). This study considers how Pro-Am projects harness the passion and commitment of amateur participants and ultimately evaluate the possible contribution of Pro-Am theatre to the UK's theatre ecology.

Another definition of the term 'Pro-Am' is offered by Leadbetter and Miller (2004): "A Pro-Am pursues an activity as an amateur, mainly for the love of it, but sets a professional standard" (p.20). They go on to claim that "A society of Pro-Ams should have better mental

and physical health, stronger social capital, more innovation and labour market flexibility and a livelier democracy. Should public policy be redirected to promote these spillovers?" (p.56). These arguments have informed this research, however the notion of '*the Pro-Am*' as an individual is distinct to the concept of Pro-Am theatre being explored in the study.

These definitions resonate with the concept of Pro-Am used in this research, as they highlight the varying levels of status, degrees of collaboration and types of relationships that can exist between professionals and amateurs. "People who are not constrained by training in a particular discipline are free to cross boundaries and to experiment. This can produce exciting new developments" (Development and Learning in Organizations, 2015, p.24). Pro-Am theatre can be classed as one of these developments.

3.5.4 Defining Pro-Am theatre

A Pro-Am theatre project is defined by Perry and Carnegie (2013) as one where:

either (a) adult amateur participants perform on an equal footing with professional players, resulting in what might be termed a co-production or (b) professional practitioners mentor a fully amateur cast, with both categories within an established professional theatre setting (p.384).

The definition differs from the collaborative work between amateur performers and professional facilitators known as 'community theatre'. This traditionally involves professional facilitators spending an extensive period in a particular geographical area to devise a play involving local performers which aims to celebrate and invigorate that community (Van Erven, 2001). Pick (1980) suggests that, broadly, community arts and artists "claim to be speaking, at local or national level, for the majority – the great mass of people who have been disconnected to the heritage arts for reasons of their class history, their education or their environment" (p.25). This is echoed by Burden (2001): "Community theatre is usually group devised and is based on the stories and experiences of the people involved" (p.23).

McGrath (2002) argues that "theatre, of all the arts, surely works at the interface between the creative and the political" (p.137). Community theatre is also known for its capacity to be radical and have a socio-political agenda (Kershaw, 1992). Conte and Langley (2007) claim that community theatre depends on strong leadership just as commercial theatre does, stating "Theatrical productions don't come from good intentions. They need a lot of hard

work and a clear minded leader” (p.141). Pro-Am theatre could be considered as a particular form of community theatre, given its collaborative process, need for strong leadership, and the fact that some Pro-Am productions do take inspiration from an SPTO’s locality, but the definition used in this research is distinctive: “the phenomenon of amateurs who work with established professional theatre providers, appearing on professional stages, in what can be a particularly public, prestigious and high-stakes form of community participation” (Perry and Carnegie, 2013, p.384). This concept of Pro-Am theatre is based on paid professionals working with volunteer amateur participants within the SPTO setting. These amateurs could either be participating on an individual basis, or as part of a pre-existing autonomous amateur theatre group.

3.6 Summary: Macro environment

There is no literature directly addressing the phenomenon at the heart of this study, large-scale Pro-Am theatre in SPTOs. However, aspects of it can be found across a range of bodies of literature and other sources. The two literature review chapters have therefore located the study and demonstrated that there is enough interest in the component parts of the phenomenon to justify the research.

The literature review also substantiates the case study selection. For example, Leadbetter and Miller (2004) assert that amateurs do not want to be called amateurs. One of the Pro-Am case study organisations avoids this term, and the other embraces it. The study aims to discover why these choices are made and how the SPTOs manage expectations of Pro-Am initiatives.

Not only has non-professional theatre-making been marginalised in practice and in cultural policy terms, but it has also been largely ignored from a research perspective. Given the paucity of knowledge on the ways in which subsidised theatre organisations engage with large numbers of non-professional participants with a pre-existing passion for theatre, as well as those with no theatrical aspirations, there is a clear original contribution for this study to make.

4 Methodology

The relevant literature has been reviewed to develop the main themes for exploration and to demonstrate that this study contributes to knowledge with a developed understanding of large-scale Pro-Am theatre in SPTOs. This PhD research contributes to knowledge principally by being an original, empirical arts management study. Attention now turns to the methodology used to address the central question. This chapter describes how the study is approached philosophically; explains the research design, ethics and limitations; and justifies how data has been generated, collected, and analysed.

The thesis is written in the first person. Presenting the study's methodological narrative and findings from my personal perspective reflects my interpretive epistemological position and evokes Caulley's (2008) suggestion of the qualitative researcher as an instrument who embodies the research, embarking on a personal, reflexive journey.

A well-designed methodology is the cornerstone of strong research because it connects the research questions with the data (Punch, 2006). A research inquiry is embedded in the researcher's ontological stance, which lays the foundation for their philosophical position or epistemology. This suggests the most appropriate methodological approach and in turn the most suitable tools with which to gather and analyse the data (Corbetta, 2003). The final element of the methodology design is to define the purpose of the study, for example, to explore, describe, or explain, (Neuman, 2015; Yin, 2003) and how best to communicate the outcomes.

Crotty (1998) portrays the foundations of social science research as: a) epistemology (with ontology sitting alongside it to collectively inform the theoretical perspective); b) theoretical perspective; c) methodology; d) methods. The foundations of this study, as defined by Crotty's (1998) model are: a) subjectivism (with social constructionism; b) interpretivism (with a phenomenological view); c) a case study design; d) interviews, observations and document analysis. These elements are now explained in further detail.

4.1 Philosophy of social science research

Williams and May (1996) claim that the relationship between social science research and philosophy improves what we know and understand of the world, with philosophy concerned

with what kinds of things exist and what makes us want to know about them, and social research concerned with the “knowable properties” of those things (p.9). Mason (2002) emphasises the importance of being clear about the *essence* of a research enquiry, of finding a focus and knowing with conviction where one stands. A set of informed philosophical assumptions therefore build a framework for the social science researcher.

Qualitative research in the field of management and organisations is often positioned along the metatheoretical objectivist/subjectivist continuum (Morgan and Smircich, 1980). The objectivist assumption is that there is an external concrete reality, with patterns and regularities, which can be observed and measured through research. The subjectivist assumption holds that reality is imagined and produced by autonomous human knowledge and the meaning given to one’s surroundings, and that research can be used to understand these subjective experiences. Cunliffe (2011) suggests this dualist typology should be revised by evoking Lather’s (2006) three ‘knowledge problematics’ of intersubjectivism, subjectivism, and objectivism. Lather (2006) argues that the term ‘problematic’ “calls on a cross-disciplinary sense of where our questions come from, what is thinkable and not thinkable in the name of social inquiry in particular historical conjunctions” (p.46). Cunliffe (2011) states these problematics “better reflect the range of metatheoretical assumptions and blurred genres underpinning contemporary research and theorizing” (p.666) because they are fluid categories with overlapping tensions and incommensurabilities.

I am approaching my study from a subjectivist problematic because the purpose is to understand Pro-Am theatre in SPTOs through the people involved, or “explore constructions of social and organizational realities in a particular context and time” (Cunliffe, 2011, p.656). An objectivist approach would be unsuitable, given the study’s links to artistic practice and the degree to which art and creativity are open to interpretation. However, I recognise the fluid boundary between subjectivism and intersubjectivism, a problematic which sees reality as a relationally embedded experience where we are not ourselves in isolation, but create meaning through our exchanges with others. This is resonant given that creating theatre is a collaborative process. However, this is a piece of empirical social science research of a particular form of creative practice (large-scale Pro-Am theatre), which I am studying in a subjective way.

My subjectivist metatheoretical position is informed by my ontological and epistemological assumptions.

4.1.1 Ontology

Ontology is the study of reality and of 'being' (Corbetta, 2003). Heil and Whittaker (2007) discuss the role of ontology in researching strategic management in organisations. They evoke Heidegger's (1994) notion of the organisation as ontologically being a work, which is more akin to a work of art than an act of labour, and "the kind of entity that is fundamentally characterized by setting up a world for people" (Heil and Whittaker, 2007, p.389). This is a fitting ontological status for the organisations being studied: as previously stated, arts organisations exist primarily through the people who populate them. If a different set of managers, practitioners and administrators were to take over, the artistic output would be different. It is my subjectivist view that an organisation should not be studied as an objective entity, but through the people who comprise it, which evokes an overarching ontological stance of social constructionism.

Social constructionism

This research is embedded in social constructionism. My position is that there are "multiple constructions of an external reality" (Caulley, 2008, p.444). Berger and Luckmann (1966) introduced the term to the social sciences, to explain the cyclical nature of reality, given that the interactions we have shape our social (and organisational) realities and therefore our further interactions. This philosophical position is suggested by the research domain of creative practice, which is not the miraculous product of one individual, unaffected by the world around them (Scott, 2008), but is produced and consumed socially and is open to interpretation and reinvention (Hallam and Ingold, 2007).

Easterby-Smith, Thorpe, and Jackson (2008) suggest that a social constructionist paradigm and the associated qualitative methods have strengths:

in their ability to look at how change processes over time, to understand people's meanings, to adjust to new issues and ideas as they emerge, and to contribute to the evolution of new theories. They also provide a way of gathering data seen as natural rather than artificial (p.72).

The weaknesses of the approach are the time consuming nature of data collection and the potential difficulty of analysing and interpreting high volumes of data. The authors claim that

these pitfalls can be mitigated by the tacit knowledge of the researcher. My experience in the theatre industry was integral to forming my approach to data collection. For example, during interviews I was able to ask about the risks associated with a particular stage of the theatrical process, without having to ask for an initial explanation of what that stage entailed.

A social constructionist ontological stance suggests an interpretivist epistemology (Prasad and Prasad, 2000) because the research aims to understand the ongoing processes through which people make meaning of social reality.

4.1.2 Epistemology

Epistemology is defined as the “knowability of social reality, and above all, focusses on the relationship between the observer and the reality observed” (Corbetta, 2003, p.12). The two most commonly recognised epistemological paradigms are positivism and interpretivism. A paradigm is an overall theoretical perspective or set of beliefs, which is essential in scientific research. It provides a guide or map, which underpins and inspires each step of the research process (Corbetta, 2003; Denzin and Lincoln, 2000; Kuhn 1962).

Interpretivism

Denzin (1994) claims that nothing speaks for itself in the social sciences. Everything is interpreted. This is supported by Benton and Craib (2011), who state that the social sciences “have their own specific object – meaningful social action – then they also have their own specific methodology” (p.80). This evokes Weber’s (1949) description of this approach as an interpretivist understanding.

Prasad and Prasad (2002) advocate the value of qualitative interpretivism in management and organisational research as it can offer rigorous exploration of complex questions. My interpretive approach in this study is further justified by Hatch and Yannow’s (2003) exploration of organisation research as interpretive science:

Interpretation operates at several levels: that of the situational actor and/or the researcher experiencing and interpreting an event or setting; of the researcher interpreting conversational interviews with situational actors and organizational or related documents and extending those interpretations in preparing a report; and of the reader or audience interpreting the written or oral report. In this view, all knowledge is interpretive, and interpretation (of acts, language, and objects) is the only method appropriate to the human, social world (pp.70-71).

Art asks questions and invites new interpretations (White and Hede, 2008). Therefore, my interpretive approach aims to "understand the social world through examining the interpretation of that world by its participants" (Bryman, 2012, p.380), that is, the world of large-scale Pro-Am theatre in SPTOs.

Each type of interpretive approach has a unique set of methodological implications which affect how a research project is designed and implemented (Denzin and Lincoln, 2000). I have adopted a phenomenological approach to understanding Pro-Am theatre in SPTOs.

Phenomenology

Phenomenology is a stance within the interpretivist epistemology. The phenomenological movement is broad and diverse. In this research, phenomenology is defined as being "concerned with *understanding* human behavior from the actor's own frame of reference" (Bogdan and Taylor, 1975, p.2) and involving a large degree of reflexivity (Holloway, 1997; Schutz, 1962). It fits with my philosophical stance of examining the world as the research participants see it, and informs and befits the selected methods of interviewing and observing those involved with Pro-Am theatre, examining documents pertaining to the phenomenon, and keeping a reflective research journal. Bogdan and Taylor (1975) argue that rather than seeking out facts and causes, a phenomenologist selects methods which provide descriptive data to enable them to "see the world as subjects see it" (p.2).

Groenewald (2004) suggests that "A researcher applying phenomenology is concerned with the lived experiences of the people" (p.44) and emphasises the importance of their feelings and interpretations. Expanding on this idea, Randles (2012) suggests a strategy for exploring a lived experience (such as large-scale Pro-Am theatre), which I have adopted. The phenomenological researcher is reflective, and:

- a) Considers their own personal experience, why they are interested in the topic and should be the person to investigate it.
- b) Considers the contribution a more in-depth understanding of the phenomenon can make
- c) Gathers data which offer a rich description for the phenomenon through engaging with those closest to it.

4.2 Inductive reasoning

The ontological and epistemological assumptions suggest an inductive research strategy. “Induction begins from observations of particular phenomena from which generalizations about wider phenomena are then made” (Williams and May, 1996, p.199). In other words, an inductive approach is about the process of reduction from the particular to the general; how we get from the wider world to the presentation of knowledge. In this case, how the subsidised sector of the UK’s theatre industry develops new dramatic products involving amateur participants, and the organisational implications this constitutes. This is an empirical study, which also suggests inductive reasoning (Walliman, 2006).

Morse and Mitcham (2002) call analytic induction a “sacred tenet of qualitative research” which includes the process of “asking questions and seeking the answers in the data” (p.35). They also highlight the pitfalls of induction, such as the tunnel vision which can ensue when a researcher struggles to ascertain what data is most pertinent to the inquiry or over-categorizes the data. One technique to mitigate this is “utilizing a scaffold” (pp.32-3). This means using what the researcher already knows about a concept, or has learnt from the literature to establish the boundaries of the concept and ask questions about its attributes and characteristics. This was my approach. I had pre-existing knowledge about the existence of large-scale Pro-Am theatre and had studied the relevant literature. I wanted to understand more about the concept, how it worked and why SPTOs offered it. So I used the central themes of leadership, risk, and innovation to frame the inquiry, and the findings which addressed the central question emerged inductively from the data.

4.3 Research design

Janesick (1994) uses the metaphorical assertion that “design is the choreography that establishes the research dance” (p.209). It is a strategy for addressing the research questions and includes decisions regarding data collection (methods, sampling and triangulation), research location and the associated logistics and costs, and data analysis. The design stage is also the time to consider the ethical implications of the research.

A research methodology should be selected which is most appropriate for fulfilling the purpose of the study (Wildemuth, 1993). Research in the management field is usually

conducted in a purposive manner, to solve a problem or investigate a phenomenon. This research uses a qualitative methodology.

4.3.1 Qualitative methodology

Dabbs (1982) states that quantity can teach us the amount of something, but we need quality to understand the nature of that thing. This is supported by Miles and Huberman (1994) who espouse the ability of qualitative research to make things visible, and by Marshall and Rossman (2006) who state “the strengths of qualitative studies should be demonstrated for research that is exploratory or descriptive and that stresses the importance of context, setting, and participants’ frames of reference” (p.54).

Creswell (2013) claims that qualitative research can be every bit as rigorous and substantive as quantitative. It can be defined by what it demands of the researcher, namely: the commitment to spending extensive time gathering data in the field, the time-consuming dedication to analysing often vast amounts of data, writing up lengthy findings which show multiple perspectives and substantiate claims, and accepting that the guidelines and procedures for conducting qualitative study are fluid and can change, which can make explaining and justifying a study to others difficult. Qualitative research can be messy and throw up anomalies and contradictions because it studies humans whose behaviour is not always logical or predictable. The researcher is often directed by the participants’ behaviours, availability and control (Holloway, 1997).

Qualitative methods are used to address this study’s research questions because of their capacity to be subjective and contextual. They have flexibility, and can empower research participants, enabling them to express their position, meanings, feelings and experiences. This approach suits my philosophical stance as it explores the characteristics and concept of Pro-Am theatre through interpreting the meanings and descriptions of the phenomenon.

A qualitative methodology is also necessary for the study’s pursuit of ‘*verstehen*’, given the importance of understanding the implications of Pro-Am initiatives on the SPTOs’ organisational culture. Interviewees and people who took part in observations have been viewed subjectively rather than objectively, with consideration given to their interpretation of their actions, in addition to my own (Schwandt, 2007). Whilst a phenomenological position suggests it is impossible to view the world as a research participant truly sees it, “*verstehen*

refers to the practice of striving toward empathetic understanding” (Tracy, 2013, p.41). It is inspired by Weber’s (1949) view that the capacity of human beings to reflect autonomously on the world around them means they cannot be studied as inanimate objects can. They must be studied and understood in context, in this case, the context of large-scale Pro-Am theatre in SPTOs.

The starting point for a qualitative study is often to ask the basic question, ‘what is going on here?’ (Lindlof and Taylor, 2011). In this case, why are renowned theatre organisations putting large numbers of amateur performers on their stages? Then a more elaborated question (or ‘problem’) was formed regarding how large-scale Pro-Am theatre affects SPTOs. This was addressed through the leadership, risk and innovation framework.

This PhD research connects two fields; arts management studies and performance studies (Carlson, 2001). As with management research, a qualitative methodology is a recognised approach in research relating to theatre and drama (Somers, 1996; Taylor, 1996). Meszaros (2010) argues that performance studies “bears a closer relationship to the social sciences... than it does to traditional theatre studies” (p.191). Although there are elements of theatre studies included in the literature review, using Meszaros’ (2010) definition allows me to explore elements of the performance process in relation to the ‘managerial’ themes of leadership, risk, and innovation, rather than understanding the process from a purely theatrical perspective.

Studies which combine the arts and social sciences can present challenges. Durham-DeCesaro and Sharp (2014) conducted a transdisciplinary collaborative study between a dancer and social scientist. They found that there was conflict between the values of each collaborator, such as the appropriate ways to handle a large dataset, which had to be resolved creatively. I recognise these complexities and potential for conflict within my research. May (1994) and Janesick (2001) promote intuition and creativity as integral elements of qualitative research. This is particularly relevant to me as I was involved in researching creative practices and people. Cunliffe (2011) states that qualitative research should be approached as “a craft rather than a scientific endeavour” (p.648). Part of that craft is assembling the right combination of data gathering techniques to address the research questions.

4.3.2 Pacing the project

Somers (1996) espouses the importance of choosing an area of investigation in which the researcher is greatly interested and plans the project with regard to their skills, available resources, and time. Having spent more than a decade working in and around the theatre sector prior to commencing the study, my relevant skills, knowledge, experience and passion for the dramatic arts were valuable when planning the project. Time was the most challenging component to manage.

Pacing a research project is what Richards and Morse (2013) refer to as the:

synchrony of data making and analysis, the change of research techniques from obtaining information to verification as the project progresses, and the change of the investigator's conceptualizing process from synthesizing to theorizing (pp.222-3).

Moving too slowly and spending too long collecting data can lead to data saturation which encumbers analysis. Moving too quickly, can result in missed opportunities or under-theorising, which in turn can affect the rigour of the study.

The major factor impacting the pacing of the study is that the two case study Pro-Am projects peaked at different points, which meant astutely planning the best moments to speak to pertinent people or conduct observation sessions. This evokes Hunt (2010) who employs the term "active waiting" to describe a learned practice which the researcher develops in order to strike a balance between knowing when to proactively advance the project and when to pause the data collection to allow time for certain aspects of the research to develop. In other words trying "not to be overly rushed or overly timid" (p.72).

One significant challenge is that the most insightful time to interview Pro-Am theatre managers and facilitators is usually when they are immersed in the process of preparing a production, which also means they are at their busiest and have many demands on their time. After a contributor agreed to be interviewed, it could sometimes take up to two months before they were available to meet. Pro-Am(A) staged a production every twelve to eighteen months and Pro-Am(B) gradually developed over two phases, lasting two years and three years. I had to monitor each project's progress and carefully time the data collection. Therefore there were elements of purposeful pacing.

Figure 4 shows the timeline of the study and when the fieldwork was carried out:

2011	2012	2013	2014	2015	2016	
PhD starts (Journal)				Thesis drafted Nov 2015-Nov 2016		
Pro-Am(A) begins						on-going
Pro-Am(B) Phase 1 (2011-2012)						
		Pro-Am (B) Phase 2 (2013-2016)				
		Interviews Jan 2013 - Dec 2015				
		Observations Jan 2013 - Oct 2015				
Documents collected Oct 2011 - July 2016						
		Data analysis was on-going but main body of analysis May-Aug 2016				

Figure 4: Timeline of the study.

4.4 Case study

This PhD research employs a case study research design to understand Pro-Am initiatives in SPTOs (Gummesson, 2000). Hartley (2004) advocates using case study to collect rich data within an organisation's own context and to illuminate the theoretical issues being explored. Eisenhardt and Graebner (2007) say it can allow for under-theorised areas to be illuminated and also offer flexible and opportunistic approaches to data collection. Thomas, Pervan, and Nuttall (2009) champion case research as a way to formulate "tentative and emergent knowledge" and claim its unique ability within qualitative research is to "appeal to multiple data sources and the importance placed on description, classification and comparison" (p.742). Flyvbjerg (2006) advocates the uses of case study in social science research in producing "context-dependent knowledge" (p.222) and refutes some of the common misconceptions that case studies can be too subjective or arbitrary and findings hard to generalise. It is recognised that a data set can only ever be partial (Silverman, 2010) as a researcher can never claim to understand 'the full picture'. But by gathering data which addresses the research questions and analysing it in detail, a deeper understanding of a phenomenon can be achieved.

Case study can be employed either as a method (Yin, 2014; Berg, 2007) or an overall 'design frame' for the study (Thomas, 2011b; Simons, 2009; Stake, 2005). This study utilises case study in the latter form, with it acting as a wrapper for the data collection methods. Data gathered informs the overall findings of each case which are then reported according to the themes and sub-themes developed from the literature review. Denzin and Lincoln (1998) state that case study can be a type of narration within the interpretivist paradigm which is how it is used in the context of this study. It addresses the research question, given its characteristic of allowing the researcher to: "study intensely, for an extended period of time,

particular cases' main events, processes, and outcomes, which occur within very specific contextual boundaries" (Lee, 1999, p.26). Flyvbjerg (2006) states that one of the common misunderstandings about case study research is that theoretical knowledge is more valuable than practical insight.

Eisenhardt and Graebner (2007) highlight the importance of defining the purpose of inductive case study research: "for phenomenon-driven research questions, a researcher has to frame the research in terms of the importance of the phenomenon and the lack of plausible existing theory" (p.26). Given that the purpose of the study is to understand the inner workings of Pro-Am theatre in SPTOs from the organisations' perspective, the use of case study offers the chance to explore a variety of insights, types of information and angles. Thomas (2011a) evokes the image of a searchlight beam which is shone on the case: "Everything at the end of the beam is seen in bright light and thrown into sharp relief, shadows and all. You study what is in the beam of light and your subject of interest in it is, 'What happened here? How did it happen? What was connected to what? Why did it happen?'" (p.21). The same approach is taken in this study, which began with the motivation of exploring the phenomenon of Pro-Am theatre in SPTOs.

Just as a beam of light has an edge, a case study has a boundary (Merriam, 2009; Miles and Huberman, 1994). In this study, the bounded system of the case is the Pro-Am theatre project, specifically Pro-Am(A) and Pro-Am(B). These cases are fenced off from the overall organisations in which they exist and are "a specific, a complex, functioning thing" and "an integrated system." (Stake, 1995, p.2). In each case, I wish to understand the Pro-Am initiative in the context of the organisation, but not investigate the organisation as a whole.

Yin (2003) advocates explanatory case research when: 'how', 'when' or 'why' questions are being posed; when the investigator has little control over events; and when the focus is on a contemporary phenomenon within some real-life context" (p.1). Yin (2004) also states that a multiple rather than a singular case study can generate compelling evidence, although this presents the challenge of collecting and analysing a high volume of data. Undertaking two case studies offers the opportunity to compare and contrast the different models and gain a deep understanding of the overall phenomenon. Stake (1995) suggests pinpointing the type of case study and describes the 'instrumental case study' as a strategy to illuminate a predefined issue or concept. Stake also defines the 'collective case study' as selecting more

than one case narrative within the same instrumental case study, to address the central research question. This research uses the narratives of two case studies to explore the same phenomenon and address the central research question.

Applications of case studies can vary between disciplines (Richards and Morse, 2013). It is a common device in studies relating to both management and performance. Gummesson (2008) advocates case study research to approach little-known phenomena in management research; “phenomena that are ambiguous, fuzzy, even chaotic; dynamic processes rather than static and deterministic ones” (p.39). The complex construct of Pro-Am initiatives in SPTOs aligns with these criteria, making it a compelling research phenomenon. Wieviorka (1992) emphasises the importance of placing the case in context to generate meaningful interpretations, and claims it is the best device for studying the micro viewpoint and answering research question by looking at what organisations do. This study explores Pro-Am projects as case studies within the context of the SPTOs with a view to understanding why and how the SPTOs create them.

Taylor (1996) extols the benefits of case study in research concerning the performing arts:

Drama works through a story framework, an enacted narrative which charts the transformation of people, events and ideas. Our pioneers certainly recognised this enacted framework as they valued the individual experience, and this may be one reason why the case-study has been such an important data yielding device. It is difficult to control this story framework within an empiricist's logic. While it might be true that the scientists have an established research tradition, where common benchmarks exist, and outcomes have been quantitatively rendered, the arts, especially the performing arts, are powered by ephemeral, transitory and multiple realities. If truths are constantly shifting within a drama context, then research methodologies must privilege this shifting, and help all confront the ambiguities often experienced (pp.271-2).

A case study can illuminate phenomena involving drama and creative practice, which are transitory, temporary, and open to interpretation. Taylor (2013) argues the need to think about the case in time and space and the relationships at play within the case boundary, including those involving the researcher, which is in keeping with my reflexive approach, insider status and knowledge of theatrical processes.

Further justification for this approach comes from Chandler (2000), who advocates the use of case study in arts management research as a pedagogical tool to teach future arts managers how to deal with the multi-faceted challenges presented by both the subsidised and

commercial sectors. Chandler (2000) argues that case studies of the ‘innovative management strategies’ within arts institutions can illuminate the ways in which managers approach future challenges and opportunities in the political landscape and in matters such as funding, leadership, marketing and audience development.

The following figure illustrates the research design and data collection:

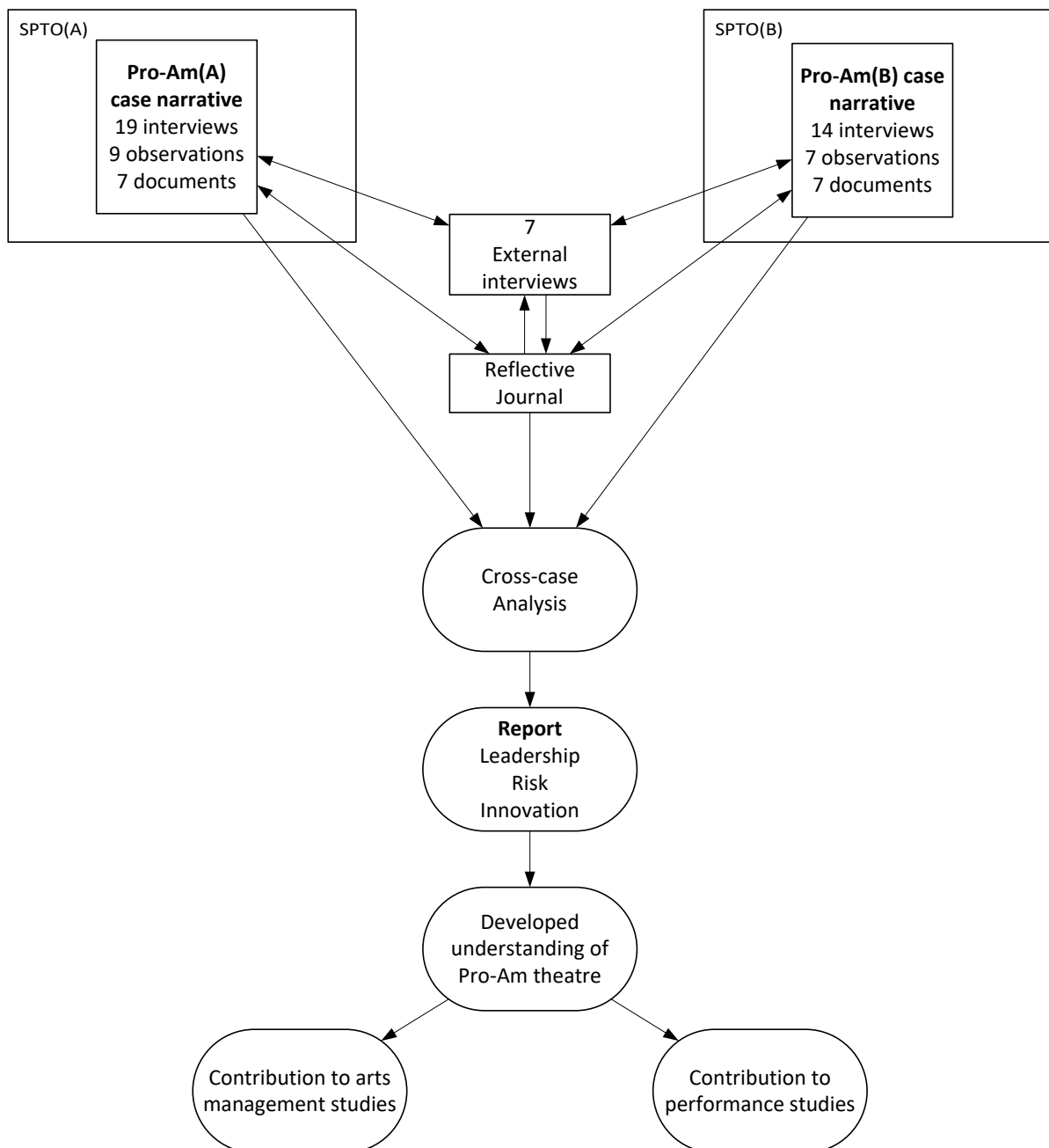


Figure 5: Research design and data collection template.

4.4.1 Case study selection/Sampling

The study employs a purposive sampling strategy (Gummesson, 2000). Cases and interviewees were selected because of their context-specific knowledge, and to fit the parameters of the study's central question and research objectives (Patton, 2002). My philosophical stance fits with purposive sampling as the best way to locate and engage with those who have had direct experience of the phenomenon (Krueger, 1988).

Richards and Morse (2013) state the importance of clarifying the scope of a research project and nature of the data required: "Scope involves both the substantive area of inquiry (the limits of the research topic) and the areas to be researched (the setting[s] and sample)" (p.89). 'Nature of the data' has a two-fold implication, meaning the way data is created and how data and the research task fit together. These two implications require an exploration of "the possible ways of constructing data within a setting and to select methods that will combine to ensure that the data will be sufficiently rich, complex, and contextual to address the question and support the required analysis" (Richards and Morse, 2013, p.91). This explains the decision to utilise a selection of data collection methods within the overarching case study design.

Case study research requires many sampling decisions along the way (Maxwell, 1996), as the researcher is constantly considering which elements of the case study to focus on, such as who to interview, what to observe, and which documents to view. A purposive sampling strategy was employed throughout, which at times naturally developed into snowball sampling and incorporated elements of opportunity sampling.

4.5 Quality and rigour

The concepts of validity, credibility and reliability are complex, and controversial when applied to qualitative research, as they come from a positivist and objectivist perspective, more akin to quantitative research (Gibbs, 2007; Seale, 1999). Easterby-Smith, Thorpe and Jackson (2008) claim that a purely qualitative study carries the stigma of merely collecting subjective opinions, which can harm its credibility to policy-makers. Whilst considering this caution, I argue that, if the study remains focussed on addressing the objectives and has a consistent philosophical approach, then providing an opportunity to hear the voices of those

at the cutting edge of Pro-Am theatre work through 'collected opinions', can yield constructive and insightful findings.

Yanow and Schwartz-Shea (2014) argue that qualitative methods are inherently interpretive, requiring flexible responses, and therefore cannot be subjected to the same validity criteria as quantitative methods. Sandberg (2005) states that whichever criteria are used in interpretive research must align with the philosophical assumptions. The ontological and epistemological assumptions of qualitative researchers are often at odds with an 'audit trail', meaning that it would be both impossible and inappropriate for another researcher to retrace the steps of a piece of subjective, interpretive research to try to achieve the same outcomes (Symon and Cassell, 1998). Qualitative researchers do however strive to justify their data interpretations and so instead use language like "rigour" or a "rich sense of authenticity" (Somers, 1996, p.168). Morse, Barrett, Mayan, Olson and Spiers (2002) suggest that applying post-hoc assessments of qualitative research, such as the criteria suggested in the 1980s by Guba and Lincoln of credibility, transferability, dependability, and confirmability, can limit the researcher's ability to be nimble and alive to achieving rigour throughout the study.

My approach complies with Thomas' (2011a) emphasis on pursuing quality over validity in case study research. Though this is difficult to define, Thomas (2011a) adapts Hammersley's (2005) indicators of quality to suggest that the case study should: be written clearly, with terms defined where necessary; have a clear problem or question to be addressed; explain why each data collection method was chosen; provide a sufficient account of the research process and suitability of the researcher; and make claims which are clear and well supported by the data.

4.6 Gaining access

Gaining access to an organisation or individual can be challenging and complex. I took the approach advocated by Wellington and Szczerbinski (2007) which comprises awareness of four fundamental issues. First, how the researcher may be viewed, for example with suspicion or as an ally. Second, the hierarchy of the organisation, so that names and contact details can be matched up, 'gatekeepers' approached and the appropriate channels negotiated in order to obtain permission and consent. Third, to be clear and transparent with everyone concerned regarding the purpose and extent of the study, the demands on participants' time and likely

publications. Last, that any potential issues of a sensitive or controversial nature are noted and addressed as early as possible.

I was fortunate that almost everyone I approached engaged with my research and was happy to speak to me. In an industry like theatre, which is built on a collective passion for this art form, it is my experience that people are often happy to talk about what they do. I was only turned down for an interview on one occasion, by an organisation related to arts funding. I was advised to consult their website for information as they did not engage with researchers directly. This information proved adequate to address my questions.

Access to SPTO(A) was relatively straightforward. I made it clear however that this research project was positioned differently from the previous one and that I wished to understand the challenges of Pro-Am work as well as the opportunities, so would need to ask difficult questions. The leaders of the organisation who granted my access understood this. This follows Silverman's (2010) advice to draw upon an existing circle of contacts when conducting fieldwork.

Access to SPTO(B) presented a greater challenge. It is a large organisation and so it was difficult to get a response to my initial emails. Access was eventually gained through a third party. A member of an organisation which had collaborated with SPTO(B) in creating Pro-Am(B) contacted SPTO(B) on my behalf.

Gatekeepers are defined as individuals who control information and access to research settings and participants (Silverman, 2010). Neuman (2015) states that gatekeepers can shape the direction of the research. Gatekeepers were integral to my route to access, arranging interviews with senior figures within organisations and sending further materials. Other types of gatekeepers contacted the participants on my behalf to ask if they would be interviewed about their experiences. Both organisations did this openly, suggesting participants who they knew might be critical as well as those who would speak positively about the experience.

4.6.1 The researcher in the field

Hunt (2010) defines qualitative research as an 'embodied practice' meaning that the researcher cannot avoid their experience and tacit knowledge. Lincoln and Guba (1985) advise that a researcher capitalise on all of their previous knowledge:

admitting tacit knowledge not only widens the investigator's ability to apprehend and adjust to phenomena in context, it also enables the emergence of theory that could not otherwise have been articulated (Lincoln and Guba, 1985, p.208).

The researcher is the 'instrument' to gather the data and is not divorced from the phenomenon being investigated: "This means reflexivity on their part; they must take into account their own position in the setting and situation as the researcher is the main research tool" (Holloway, 1997, p.2). The researcher cannot be separated from their own presuppositions and it is pointless to pretend otherwise (Neuman, 2015).

The qualitative researcher's position, perceptions, and experiences are important (Philip, 1998). Considering my status in the field led me to ruminate on my position on the insider/outsider continuum, where broadly speaking, an 'insider' is equipped with prior knowledge about a research setting and its members and an 'outsider' is not.

A telephone interview I conducted highlights my fluid movement across several insider/outsider spectrums. The interviewee was a Pro-Am participant I approached who coincidentally turned out to be an experienced theatre scholar as well as a member of an amateur theatre society. The interviewee told me they take care not to speak in an 'academic register' when directing fellow amateur theatre members, because discussing a play in this way can alienate people, and it is more constructive to discuss it in a practical sense. This led me to think about the different registers I was speaking to people in. I maintained an open and honest approach, but I realised that there were subtle changes in the register I used when I addressed different research participants. For example, there was a shared understanding of certain language which varied whether I was talking to a theatre practitioner, amateur participant, marketing manager or chief executive. My knowledge of both theatre and management processes, coupled with my reflexive stance enabled me to negotiate and validate my position in the field.

4.6.2 Data management

When planning the project, I was concerned with how I would manage and analyse large qualitative datasets. An initial decision to use computer software for analysis was changed after I felt this did not reflect my subjectivist position. Feeding the data into a computer programme to generate findings electronically felt objectivist and I wanted to keep the interpretive feel of manual management and analysis of the data. One particular piece of

technology however, did play a pivotal role, the computer programme OneNote. This decision was endorsed by Tessier's (2012) article on qualitative data management, and the suggestion that this technology can "increase the effectiveness, efficiency, and economy of qualitative data management" (p.446). OneNote is a Microsoft programme which is designed to be digital notebook and organiser. I used OneNote to organise the data by colour-coding and annotating interview transcripts and field notes. By doing a keyword search on the themes and sub-themes I was able to pull together all the sections relating to certain themes.

All interviews were audio-recorded with permission (Bailey, 2007). Hard copy consent forms were signed on the day of face-to-face interviews. I also kept research information sheets with me during all fieldwork, although the information they contained was emailed to interviewees in advance when explaining the interview request. Telephone interview consent forms were emailed and scanned or posted back to me (Bailey, 2007). All audio files were stored in a password protected personal computer. Code A was given to all data pertaining to Pro-Am(A). Code B to all data pertaining to Pro-Am(B). Code X was given to the interviewees selected as 'external experts'. These contributors had experience which was relevant to the topic of large-scale Pro-Am theatre, but were not part of either Pro-Am(A) or Pro-Am(B).

Reflective field notes are "a secondary data storage method in qualitative research" (Groenewald, 2004, p.48). I wrote detailed notes in my journal as soon as possible after each piece of fieldwork. These included any issues with equipment or the location, memos for analysis, ideas for further fieldwork, and follow-up questions. I used the template of field note-taking shown below:

Observational notes - 'what happened notes' deemed important enough to the researcher to make.

Theoretical notes - 'attempts to derive meaning' as the researcher thinks or reflects on experiences.

Methodological notes - 'reminders, instructions or critique' to oneself on the process.

Analytical memos - end-of-a-field-day summary or progress reviews (Groenewald, 2004, pp.48-9).

Definitions of terms and codes

The terms used throughout the study to define the people involved are as follows:

A contributor = a person who contributed directly to my research, such as an interviewee.

A participant = a person taking part in a Pro-Am project.

A practitioner = a theatre professional who works with the participants during the Pro-Am initiative; such as a voice or movement specialist.

A facilitator = a staff member at an SPTO who administrates the Pro-Am initiatives.

The code used to define each piece of data is a compound of three elements; the data type (Interview, Observation or Document; number (1-38); letter denoting Pro-Am(A), Pro-Am(B) or an external expert (A, B or X). For example; Int09X; Obs01A; Doc02B.

4.7 Research methods

This study uses multiple methods (Philip, 1998) because complementary methods address different facets of the research question, and also address the same question from different perspectives. This is a common facet of qualitative research (Denzin and Lincoln, 1998; Brewer and Hunter, 1989). Silverman (2010) highlights the potential pitfalls of integrating qualitative methods, such as an overwhelming amount of data. To combat this, I took an iterative approach by analysing data and revisiting the research questions and literature on an on-going basis (Tracy, 2013).

The rationale for strong qualitative research should clearly demonstrate how the methods selected flow naturally from the research questions (Marshall and Rossman, 1996). The usefulness of methods depends on what we keep and lose from the world and are evaluated in terms of the questions being asked.

Holloway (1997) asserts that “Qualitative research is not static but developmental and dynamic in character, the focus is on *process* as well as outcomes” (p. 6). Bazeley (2013) also advises analysing the process as well as the data. Therefore observations and reflections on the limitations and pivotal moments of using each method are presented in each section.

4.7.1 Semi-structured interviews

The craft of qualitative interviewing is the subject of much debate and theorising. One very early definition is of the interview as a conversation with purpose (Webb and Webb, 1932).

Probing an interviewee's experiences, feelings and perceptions, listening to their stories and eliciting their version of a situation can offer rich data and "obtain both retrospective and real-time accounts by those people experiencing the phenomenon of theoretical interest" (Gioia, Corley and Hamilton, 2012, p.19). Heil and Whittaker (2007) claim that anecdotes and narrative responses can provide "minute and concrete detail" (p.386). Put simply, interviews can "reach the parts which other methods cannot reach" (Wellington and Szczerbinski, 2007, p.81).

The ontological and epistemological positions adopted for this research suggest that the best way to generate data is to interact with the stakeholders of Pro-Am theatre in SPTOs. The research question and objectives seek to explore "people's knowledge, views, understandings, interpretations, experiences, and interactions are meaningful properties of the social reality" (Mason, 2002, p.63). This is supported by Roulston (2011) who states "a 'constructionist' approach to interviewing – conceptualizes the interview as a socially-situated encounter in which both interviewer and interviewee play active roles" (p.348). Semi-structured interviewing constitutes the majority of the data collection. First, it is in keeping with a phenomenological approach; to get the subjective 'insider' perspective; and to generate in-depth contextual information (Groenewald, 2004). Second, the data needed to best address the research questions is not feasibly available in any other form (Mason, 2002). The best way to understand why and how SPTOs develop Pro-Am initiatives is to ask the people involved. The dominance of interviews in the data collection means that it constitutes the largest part of the methods section of this chapter.

Mason (2002) suggests that interview data is not excavated, but involves the construction or re-construction of knowledge. It is a co-production between the interviewee and researcher, with meanings created through their interactional exchange. This study employed semi-structured interviews. This is because in order to address the central question, benchmark best practice and document some of the challenges of Pro-Am theatre in SPTOs, many of the same questions had to be asked of both case study organisations and also the external expert interviewees. However, the interview planning also allowed for unexpected tangents and input from the interviewee. The questions were mainly based on the three key themes of leadership, risk and innovation, with a view to understanding the interviewees' experience and perspective of each theme. Wording was changed slightly depending on the interviewee's

position and status. For example, the leader of an SPTO would be able to give a different perspective on leadership from the leader or manager of a Pro-Am project. This iterative interview design (Rubin and Rubin, 2005) allowed me to adapt to circumstances in the field by adding or changing interviewees and modifying questions where necessary, therefore keeping the study focussed on addressing the research question and objectives. It also demonstrates my reflexive approach to the fieldwork.

The following framework shows some of the key questions, which were then adapted for each case study interviewee:

For SPTO leaders and facilitators:

- Explanation of my research and where I am up to (emphasising organisational perspective and leadership, risk and innovation framework).
- Please tell me about your background and your role at the organisation.
- Please tell me about how the [name of Pro-Am project] started and developed.
- Please tell me about your role in [name of Pro-Am project]
- Please reflect on your role as a leader/manager of this project. What are the 3 most important skills required for success?
- What are the benefits to the organisation of offering this kind of project?
- What are the risks?
- How are the risks mitigated?
- Plans for the future, will the project be continued?
- Do you think there should be a change in cultural policy to encourage more funded theatre organisations to offer these initiatives?

For practitioners:

- Has your experience changed your perception of amateur theatre?
- Has it changed your practice?
- Are there any differences in the way you work with professional and amateur performers?
- How does the scale affect your practice?

For participants:

- Why did you decide to take part?
- Has the experience been what you expected? (Please explain why)
- How would you describe the relationship you have with [the SPTO] and its staff and its buildings?
- What are the 3 most important things you have gained from being involved in [name of Pro-Am project]? (Could be skills or experiences)
- Would you repeat the experience? (If not please say why)

I started by writing an opening statement, tailor-made to each interviewee about where I was in the process, what the study was trying to achieve and what their contribution would be. This is what Frey and Mertens Oishi (1995) call the “introductory statement” (p.44) and they advise that it is kept short, conversational and engaging. They recognise that telephone interviews are harder in this regard as it has to be even shorter and sharper. They also advise careful structuring of interview questions in order to build up to difficult ones and avoid listener-fatigue.

I considered the question sequencing carefully. Pitching the right questions in the best order was a challenge. On one hand I often wanted to ask the general question “how does this phenomenon work?” but on the other hand people are very busy and need precise questions which clearly explain what is required of them. I often used previous interviews as templates, for example if I had already interviewed someone in a similar position from the other case study organisation I would refer to those questions, so that I was consistently getting as many interpretations of the research questions as possible.

Eisenhardt and Graebner (2007) claim that when using interviews as part of case study research, “The challenge of interview data is best mitigated by data collection approaches that limit bias. A key approach is using numerous and highly knowledgeable informants who view the focal phenomena from diverse perspectives” (p.28). I used interviewing as my main method of data collection in order to understand the implications of Pro-Am theatre from as many perspectives as I felt necessary to address the research questions.

Three group interviews were held, each containing two interviewees. Barbour (2007) warns that the process of interviewing a homogenous group can raise issues which subsequently adversely affect the group dynamic. However, each pair was used to working closely together,

which enabled uninhibited and detailed responses. Any conflicting opinions proved particularly insightful and were discussed openly.

Most interviews were conducted face-to-face. Due to the interviewees' geographical locations and busy schedules, telephone interviews were conducted on eight occasions. A telephone interview forgoes the ability to make eye contact and smile, to help interviewees feel comfortable, or provide what Irvine (2011) calls "acknowledgement tokens" (p.211). Trier-Bieniek (2012) defines qualitative telephone interviews as "participant-centred" (p.630). By making contact in advance, Trier-Bieniek (2012) argues it is still possible to make respondents feel informed and appreciated, and can actually empower an interviewee who may find face-to-face interviews intimidating. Hunt's concept of "active waiting" (2010, p.75) is applicable as an interview technique as well as for pacing the whole research project. In this sense, it means waiting for a respondent to speak, showing you are listening, and making them feel comfortable. I found this somewhat harder to do by phone, as I had to judge when to interject with a "yes" or "right" which showed my interest in the interviewee's response, without interrupting them.

Block and Erskine (2012) note there are advantages and trade-offs when conducting semi-structured interviewing by telephone as opposed to face-to-face. The main two advantages are cost and time efficiency. It is far cheaper and takes less time to telephone someone than to travel to them. The main challenge is the lack of visual aids available in a face-to-face interview.

Interview statistics

Thirty-eight people were interviewed. Thirty-nine interviews were carried out. Each individual was assigned a numbered code. Some people were interviewed more than once, or in pairs. Follow-up interviews were denoted with additional roman numerals. This generated a new code, which showed that the same person was interviewed on more than one occasion. There are forty-two interviewee codes in total. This is not a study of gender or diversity in British theatre, although both would be worthy studies in their own right. It is rooted in the organisational perspective and so interviewees were selected purely on the basis of their roles. Of the thirty-eight interviewees, nineteen were male and nineteen were female.

Table 1 shows the interview statistics:

	Pro-Am(A) interviews	Pro-Am(B) interviews	External expert interviews
Face-to-Face (1 to 1)	17	6	3
Telephone	1	5	2
Group	1 (2 x interviewees) Face-to-face	1 (2 x interviewees) Telephone	1 (2 x interviewees) Face-to-face
Email	0	2	0
Total interviewee codes	20	15	7
Total interviews	19	14	6
Longest duration	01:07:19	02:02:53	01:30:38
Shortest duration	00:15:28	00:30:59	00:28:34
Average duration	00:49:00	01:07:00	00:52:00

Table 1: Interview statistics

Table 2 shows the codes given to each interviewee:

Code	Description
Int01A	Practitioner
Int02A	Participant (writer)
Int03B	Chief executive of organisation which supports amateur creative practice
Int04A*	Creative learning department manager
Int05A* ^	Creative learning project worker
Int06A ^	Artistic director
Int07A	Trainee artistic director
Int08B ^	Producer/project leader
Int09X*	Outreach department manager
Int10X*	Outreach project manager
Int11X	Cultural commentator and expert in cultural policy
Int12X	Cultural commentator and expert in cultural policy

Int13B	Former chief executive
Int14A	Chief executive
Int15X	Worked in cultural policy field
Int16A	Communications manager
Int17B	Artistic director of large amateur theatre organisation
Int18A	Artistic director of collaborating theatre company
Int19A	Practitioner with collaborating theatre company
Int20A	Producer of collaborating theatre company
Int21B	Practitioner/ project mentor
Int22B	Stage manager
Int23A	Facilitator
Int24B	Senior manager responsible for Pro-Am(B)
Int25A	Participant
Int26A	Participant
Int27A	Participant
Int28A	Fundraising manager
Int29B	Participant
Int30B*	Participant
Int31B*	Participant
Int32A	Playwright
Int33B	Practitioner
Int34B	Chief executive of large amateur theatre umbrella body
Int35B	Former chair of large amateur theatre umbrella body
Int36X	Director of arts leaders training programme
Int37B	Participant
Int38X	Theatre critic and writer/commentator

A = Pro-Am(A) B = Pro-Am(B) X = External expert

^ = interviewed on more than one occasion * = group interview

Table 2: Interviewees codes.

Detailed notes were taken throughout all face-to face interviews. I endeavoured to also give visual cues, such as eye contact, smiles and nods to encourage the interviewee and to keep the interview flowing, so that although I was taking notes, it felt like a conversation and not an interrogation. I explained at the beginning of each interview that I would be writing notes in order to formulate any new questions which arose throughout and write memos for analysis and ideas for further fieldwork. The occasional pauses which ensued while I wrote were often filled by the interviewees with insightful and developed responses to some of the questions. This approach is advised by Tracy (2013) who extols the importance of interpreting during the interview: “clarifying and extending the interviewee’s answers (p.161). I used memos to record reflections after each interview, and then incorporated these as part of the analysis process. Miles and Huberman (1984) advocate this technique as a way to “capture the thoughts of the analyst on the fly” (p.71). Memos are also useful as ways to tie pieces of data together or show a piece of data as an instance of a concept (p.69).

An example of a memo from the research journal is given below:

Reflection: Excellent interview. Full of great ideas and quotes. Could ask some further questions to compare with [06A’s] answers: 1) Reviews: do you feel an obligation to the participants if reviews are critical? 2) Policy: do you think cultural policy should be amended to reflect this work? Also, I need to find more about the logistic risks of a show of this size and type. Ask [20A] for an interview.

Interviewee sampling

Snowball sampling can be used to learn about “an interconnected network of people or organizations” (Neuman, 2015, p.274). In this study, members of each case study organisation recommended others I should speak to. Noy (2008) talks of ‘exploiting’ the social networks of interviewees, which also happened to me, when I was able to reach an interviewee who was a senior figure within an organisation because another interviewee knew them and offered to contact them on my behalf. Snowball sampling can also open up clusters of new interviewee groups. For example I asked a Pro-Am project administrator to contact participants on my behalf and ask if they would be interested in speaking to me; those that were contacted me directly or gave their permission to the project administrator for me to contact them. This is an example of strategically using both purposive and snowball sampling together.

Opportunity sampling is a type of incidental sampling in which the researcher's knowledge of the research environment is used to identify a sample. Bryman (2016) defines it as "Capitalizing on opportunities to collect data from certain individuals, contact with whom is largely unforeseen but who may provide data relevant to the research question" (p.409). Brady (2006) states that whilst this can enable the researcher to proactively engage with the research domain to find samples, it is sometimes viewed as a weak form of sampling because the selected samples may not be a reliable representation of the data set. I would argue that my epistemological position supported me approaching a select few interviewees in their working environment to discuss their potential contribution to my research. I found four interviewees this way, two whom I already knew I wanted to contact, and two who were unforeseen. Three were approached at theatre industry conferences and one SPTO staff member I approached after seeing a Pro-Am production at the theatre.

Figure 6 depicts the sampling strategy used to secure the interviewees:

Code A = Pro-Am(A)

Code B = Pro-Am(B)

Code X = External experts

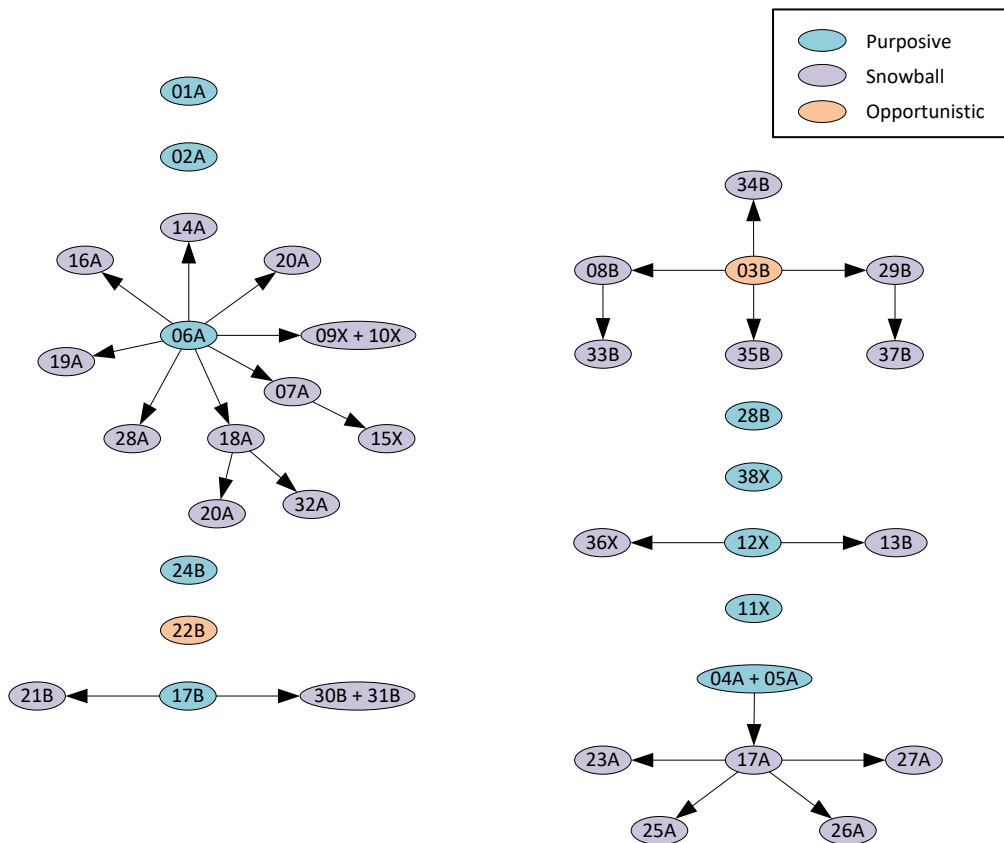


Figure 6: Interviewee sampling strategy.

Key contributors

The key contributor for Pro-Am(A) was one of the leaders of the organisation, who directly oversaw the strategy of project. I was offered a series of short interviews as this worked better with their schedule, and so I used each interview to discuss a different topic. I was also invited to send questions in advance for their perusal, meaning we could maximise our contact time by discussing some points in depth and enabling me to ask follow-up questions. During three interviews over a thirteen month period, this key contributor:

- Discussed the genesis and objectives of Pro-Am(A) from an organisational perspective as well as their hands-on experience of working with the participants and directing a show.
- Discussed their role as artistic leader of the organisation.
- Gave permission for me to attend auditions, rehearsals, performances and other events.
- Recommended other members of SPTO(A) staff for me to contact.
- Reflected on the development of Pro-Am(A) from its inception to date.

The key contributor for SPTO(B) was the producer of Pro-Am(B). This person was the spokesperson and liaison for the project. They did not hold overall responsibility for the project, as that belonged to a member of the senior management team within the organisation, but the producer was hired specifically to facilitate the project and it was their full-time role. During two interviews lasting two hours, with a gap of seventeen months, this key contributor:

- Discussed the structure, objectives, marketing, financing and other elements of the project.
- Recommended other interviewees such as Pro-Am(B) participants and practitioners.
- Shared documents pertaining to Pro-Am(B).
- Gave permission for me to attend workshops, performances and other events.
- Reflected on how the project had developed over the course of its two phases.

Questions were designed around the three main themes of leadership, risk and innovation.

Challenges of interviewing

Denzin (2001) claims that "the interview is an active text, a site where meaning is created and performed" (p.25). I found that people who work in the performing arts make good interviewees. They are conversant when addressing an attentive audience (for performers, albeit often as another character rather than as themselves) and expressing opinions. However, this also raises the potential complexity of socially desirable responding (Zerbe and Paulhus, 1987). This suggests that interviewees' theatrical experience makes them adept at 'performing' and constructing an identity for the interviewer. It was therefore recognised as a possible limitation that interviewees (particularly those responsible for the Pro-Am initiatives) may be wholly positive about the experience (Johanson and Glow, 2015).

Another challenge of interviewing is that people are asked to explain their emotions using language, which can constrain self-expression. Theatre participation can be an emotive subject and there are limitations on the extent to which one can capture and communicate the value of the performing arts through language. Walmsley (2016) recognises that theatrical topics can be challenging to research retrospectively, because the essence of experiencing the live event is difficult to capture. Writing about the relationship between audience experience and cultural value, Walmsley (2016) highlights the difficulty of researching the

audience experience after the event. This view resonates with my experience of interviewing those involved with Pro-Am theatre. For example, an interview with a Pro-Am participant about their experience can differ greatly before the process starts (when there might be apprehension), during rehearsals (which can be exhausting and stressful, especially when a participant has to fit them around their full-time job), during the run (when adrenaline and the collective euphoria often experienced by a cast and production team take hold), and afterwards (which can leave a sense of deflation and sadness that the experience is over).

Two interviewees whose working hours prohibited a telephone interview asked for questions by email. Another two asked for email questions ahead of a verbal interview. I found this challenging, as writing questions felt more formal than a conversation.

Interviewing is the principal method. Observations were a way to see the process and product in action, and the documents showed the way the organisations communicate with participants, audiences and other stakeholders. Observations and documents were used for triangulation, to understand the conditions in which the projects took place and to inspire research questions.

4.7.2 Participant observation

This method is appropriate given the ontological position that "sees interactions, actions and behaviours and the way people interpret these, act on them, and so on, as central" (Mason, 2002, p.85). Therefore meaningful knowledge can be generated by observing social situations that already exist. The inhabitants of the theatrical world are distinctive in that they are used to being observed by a variety of interested parties, during all stages of the theatre-making process. Therefore respondents are more likely to behave as if no external figure were present. In almost every observation session (auditions, rehearsals, workshops) I was introduced to the group by the SPTO representative who had granted me access. Either I or the SPTO representative briefly explained my research and that I wished to observe to learn more about the project. Everyone was given the opportunity to ask me questions. I did not want to make anyone feel uncomfortable or scrutinised by my note-taking, and so I always told the group I was not writing comments about them as individuals but taking notes on the process and the practitioner's methods.

Sessions varied in length from twenty minutes to three hours. Table 3 shows the sixteen observation sessions conducted:

Code	Pro-Am(A)	Pro-Am(B)
Obs01A	Audition – production 1	
Obs02A	Group rehearsal – production 1	
Obs03A	Performance (Public dress rehearsal followed by talkback session) – production 1	
Obs04B		Skills exchange workshop - welcome session
Obs05B		Skills exchange - voice workshop
Obs06B		Skills exchange - movement workshop
Obs07B		Skills exchange - combat workshop
Obs08B		Skills exchange - acting workshop
Obs09A	Group rehearsal – production 2	
Obs10A	Full company rehearsal – production 2	
Obs11A	Performance (followed by talkback session) - production 2	
Obs12A	Professional production incorporating amateur cast members from Pro-Am(A) company.	
Obs13B		Showcase of Pro-Am(B) at SPTO(B) main theatre
Obs14A	Full company rehearsal – production 3	
Obs15A	Performance (press night) – production 3	
Obs16B		Workshop for next Pro-Am project offered by SPTO(B), inspired by Pro-Am(B)
Total	9	7

Table 3: Observation sessions.

I assumed what Angrosino (2007) terms an “observer-as-participant” role. It entails short periods of observation "in order to generate data and also set the context for interviews or other research methods. The researcher is known and recognized, but relates to the 'subjects' of the study solely as a researcher" (p.54). “Selective observations” were conducted (Spradley, 1980, p.128), with observation sessions chosen based on the need to research different stages of a Pro-Am project, or to understand the process and product. In Pro-Am(A) I observed auditions, rehearsals and final performances. Pro-Am(B) did not have auditions, so I observed workshops and final performances, plus an additional workshop of a new project SPTO(B) launched following the success of Pro-Am(B). This took me momentarily outside the case study boundary, but it was an opportunity to see a professional practitioner who had been a significant part of Pro-Am(B), but who I had not been able to observe during that project, work with an amateur cast.

Practicalities and challenges

Observation can present ethical complexities. Coffey (1999) suggests that the intensely personal nature of being “bodily” present in the field can challenge researchers. A reflexive approach, planned objectives for each session, and my knowledge of theatrical processes helped combat this. Any “emotional connectedness to the processes and practices of fieldwork” (Coffey, 1999, p.158) was acknowledged within the data.

Analytical distance is the space in which to analyse the observations being made. Wessells (2007) stresses its importance in order to appreciate the dynamics at work in the observation and advocates having a design which is structured but not too tight, so the data can emerge. The researcher must be flexible in order to see the messiness of the world and remain alive to the context in order to be alert to the smallest ritual or moment.

The study investigated some stages of Pro-Am projects which had concluded, thus precluding participant observation. Pro-Am(B) started before my research. Madyaningrum and Sonn (2011) lament the limitations of studying a community arts project retrospectively because "This decreases the possibility to observe in more detail the processes of personal and collective identity transformation" (p.368). However, they also state a retrospective study can afford participants the opportunity to "reflect on the meanings they derived from participation" (p.369). These differences were recognised as part of the data generated.

4.7.3 Documents

Data was mostly generated through interviews and observations, but data was also excavated in the form of documents pertaining to Pro-Am(A) and Pro-Am(B). Corbetta (2003) claims that “there is no institutional act or socially organized activity that does not leave behind some documentary trace” (p.305). Corbetta (2003) also states that documents divide broadly into two categories, personal and institutional. As this study aims to understand Pro-Am theatre predominantly from an organisational perspective, only institutional documents were used. Silverman (2010) notes that all data, such as interview transcripts, can be classed as ‘text’. Therefore Silverman adopts the term ‘text’ as “a heuristic device to identify data consisting of words and images which have become recorded without the intervention of the researcher” (p. 52).

Using document analysis as part of a case study, Thomas, Pervan, and Nuttall (2009) accessed "promotional material, programmes, company reports, membership detail, and partnership proposals" and used this information to "help develop questions for in-depth interviews as well as corroborate findings" (p.742). This study adopts the same approach, using information gathered from material provided by, and written about, each organisation (within the boundary of the Pro-Am project) to generate detailed interview questions.

Strengths of this method include the ability to view documents relating to a phenomenon created by those involved, which can be illuminating (Lee, 1999). Also, this method can be less intrusive, costly and time consuming than others. Challenges may include gaining access, deciding which and how many documents to choose, authenticating them, and perhaps some being incomplete. As with all the methods employed, document analysis can cause ethical complications, if for example the researcher is privy to sensitive information. This emphasises the need for a reflexive approach, so that documents can be suitably analysed without compromising the trust of the research contributor.

Extant documents, such as annual reports, application forms and marketing material were sourced (Bhatt, 2012). Seale (2012) suggests classifying documents according to whether they are for internal or external consumption and available privately or publicly. Although these were pre-existing documents, the ontological and epistemological assumptions suggest my interpreted readings added to their meaning. According to my subjective, interpretive

approach, documents were not viewed as objects, because they were created by people with a view to communicating with other people.

Documents were either given to me by interviewees or were in the public domain. Some were for internal use and some were external. I gathered a large number across the course of the study but purposeful sampling was used to select fourteen for analysis on the basis that they represented a cross-section of the development of both case study initiatives. They were coded chronologically in the order they were obtained, but tell the story of each case study initiative. For example, from Pro-Am(A) there are programmes from productions 1 and 4. From Pro-Am(B) there is an early draft of the strategy for the project, the final report from phase 1 and a programme from a phase 2 showcase. A full list of the fourteen analysed documents is presented below:

Code	Pro-Am(A)	Pro-Am(B)
Doc01A	Pro-Am(A) production 1 programme	
Doc02B		Pro-Am(B) phase 1 report
Doc03A	Pro-Am(A) project worker job description	
Doc04B		Pro-Am(B) early draft of strategy (Feb 2010)
Doc05A	Pro-Am(A) mission statement	
Doc06A	Pro-Am(A) production 3 programme	
Doc07B		Pro-Am(B) phase 2 application form
Doc08B		Pro-Am(B) phase 2 DCMS blog entry (Mar 2014)
Doc09B		Pro-Am(B) phase 2 board report (March 2014)
Doc10B		Pro-Am(B) phase 2 press release (April 2014)
Doc11A	Pro-Am(A) participants feedback form	
Doc12A	Pro-Am(A) production 4 programme	
Doc13B		Pro-Am(B) phase 2 showcase programme
Doc14A	Pro-Am(A) participants contract	
Total	7	7

Table 4: Documents selected for analysis from the two case studies.

4.8 Reflective research journal

As previously stated, the researcher is the instrument in qualitative research (Janesick, 2001). Keeping a reflective journal was integral to my phenomenological stance, enabling me to reflect on the journey through the fieldwork; my decision-making processes (Cunliffe, 2003); and my interpretations and understanding of the topic (Gerstl-Pepin and Patrizio, 2009).

Engin (2011) labels the research journal a learning device which shapes the research and the researcher's knowledge and identity by cultivating a dialogue with the 'expert self'. Keeping a reflective research journal fits with the epistemological and ontological positions that knowledge and meaning are created through individual interpretation and experience.

Yanow and Schwartz-Shea (2014) suggest that the research questions generated within an interpretive study require a reflexive eye, not only on the topic being studied but also on the researcher. Reflexivity is defined by Gibbs (2007) as "the recognition that the product of research inevitably reflects some of the background, milieu and predilections of the researcher" (p.91). Tonkiss (2012) stresses the significance of a reflexive approach to social research, from the design to the writing up stage. In this study, my assumptions, processes of inquiry, and effect upon the research setting and findings were logged in the journal and taken into account. Miles and Huberman (1984) note that reflective remarks improve the use of field notes as "one is simultaneously aware of events in the site, and of one's own feelings, reactions, insights and interpretations" (p.65). Keeping the journal helped me to do this, to reflect on the research questions and my interpretive position.

Simon (1969) emphasises the importance of communicating with one's self during the process of social science research. Continually asking the fundamental question "what do I really want to know?" and writing down "what you think you are thinking" (p.29) helps to clarify thought and ensure that the research questions are being addressed. Comparing these reflections with the laboratory notebook used in the natural sciences, Simon (1969) advises documenting the process as fully as possible, such as why certain decisions were made and data included or excluded. The journal gave a narrative to the whole project and situated me within it.

4.9 Data analysis

Analysis is “a way of transforming the data through interpretation” (Groenwald, 2004, p.49). Saldaña (2016) notes the uniqueness of each piece of qualitative research, meaning that each study’s approach to analysis will be unique. An inductive approach means the themes identified are strongly linked to the data (Braun and Clarke, 2006; Patton, 1990).

Thematic analysis was chosen because it is flexible and interpretive. It is also an effective way to manage large datasets and can offer rich and detailed understanding of a research topic (Braun and Clarke, 2006; Howell and Badmin, 1996). There were a total of three superordinate categories: leadership, risk and innovation. There were a further thirteen subtheme categories: four leadership, five risk and four innovation. The codes given were not static, but were developed and refined through an iterative process (White, Oelke and Friesen, 2012) and emerged as a way to navigate the data.

Imposing a set of codes on interview data could be viewed as less in keeping with a subjective problematic and leaning more towards an objective view. However, it was integral in managing the large volume of data. I also maintained a subjective position by listening to an interview whilst coding the transcript, which was immersive, enabling me to pick up on nuances rather than viewing the text in a detached way. This position is supported by St Pierre and Jackson (2014): “To code data, then, one must assume that words textualized in interview transcripts and field notes are not only data but also brute data that can be broken apart and decontextualized by coding” (p.716).

Neuman (2014) states there are two simultaneous activities involved in coding in qualitative data: “mechanical data reduction and analytic data categorization” (p.344). This is how to manage a large dataset and also retrieve the parts of the data which are relevant in answering the research questions. The coding process reduced the data: “thematic analysis moved quickly from the full transcripts to working with syntheses of the interviews, which were produced using a combination of ‘notes and quotes’” (Irvine, 2011, p.211). “Thematic analysis involves the searching across a data set - be that a number of interviews or focus groups, or a range of texts - to find repeated patterns of meaning” (Braun and Clarke, 2006, p.86).

Interviews were coded and recoded chronologically. Although this meant, for example, going from an interview focusing on Pro-Am practice to one on leadership, it was helpful to follow

the pattern of my thinking, what stage of the research process I was in, and how my ideas were developing at the time.

I performed open coding on the data (Neuman, 2014). This means navigating through the collected data, condensing it into analytical categories, in this case the central themes and sub-themes, but also being open to new themes emerging or adapting certain codes. Bazeley (2013) talks of “breaking open and connecting data” (p.188), which is how I approached it, looking for links and connections buried within the data and in my reflections on the process. I used the theoretical framework developed through the literature review as a way of managing the data and looking for connections through an iterative process of manually coding and recoding, whilst also endeavouring to let the data speak and not impose categories too rigidly (Saldaña, 2016). Therefore some sections of the findings contain more data on one case study than the other.

Silverman (2005) advocates thinking critically about qualitative data analysis by refuting initial assumptions about the data; seeking another case to compare (and potentially disprove) a provisional hypothesis; inspecting the data comprehensively to avoid subjective conclusions; and actively seeking out and addressing anomalies. This study has two key attributes for analysis: triangulation within each case study to establish converging lines of inquiry, and cross-case comparison to synthesise findings.

Krueger (1998) states that comprehensive analysis is crucial in avoiding the “the trap of selective perception” (p.11). All fieldwork was carefully planned and carried out. For example, the same questions in the same order were used as a starting template for each semi-structured interview within a group of stakeholders. This aided analysis of the corpus of data, because even allowing for a ‘laddering’ technique, which encourages interesting tangents to develop, there was a consistent pattern.

An example of a coded and analysed data sample from the OneNote workbook is shown below. Pertinent sections were highlighted in green for leadership, orange for risk, or blue for innovation. Interpretive notes pertaining to each highlighted passage were then written next to it:

Int01A: Text	Interpretation
<p>Int01A: We've seen approximately the same numbers of people as last year which is great, I know it's about 300 but couldn't give you an accurate number. Now obviously, as I said to you last year it is always our intention to develop [Pro-Am(A)] as a corner stone of the programme here and to have a year round programme of work as well as the projects But it always takes two years to get large scale funding on board because you kind of have to prove your case. And we did achieve something unusual I think with [production 1] in terms of achieving that level of critical acclaim etc., but it was a good start, that's what I feel it was a good start, now we need to up our game. So we were successful in a 4 year bid to [name of CTF], and again that news just came in before Christmas.</p> <p>Interviewer: Can you tell me a bit more about what that is?</p> <p>Int01A: The [name] is a charitable foundation and you can look up their aims and stuff online, but they fund arts projects and basically that funding is going to be the backbone, it won't fund everything but it's going to be the backbone of developing the [Pro-Am(A)] programme for the next 4 years, taking us up to 2016</p> <p>[...]</p> <p>It's really important to have a second pair of eyes, because when you're leading an exercise, you see nothing, you absolutely do, so you need to be able to step out and just have that second opinion. I also feel it's really important to have a trained choreographer's eye in the room, because they see the aspects of how people move that I don't pick up on, I pick up on general skills or enthusiasm</p>	<p>Rationale: Mission of the project. Not just productions.</p> <p>Financial: Needs external funding.</p> <p>Artistic: Critical acclaim, but just the start, where do we go next?</p> <p>Process: Longer-term, the process of developing the initiative, not just the process of a production.</p> <p>Financial: CTF is the backbone but org needs to subsidise this. What will happen when the funding runs out?</p> <p>Process: Information about the pro team and how they collaborate. What they look for in the audition workshops.</p>

The 'report', presented in the form of the three findings sections, is a collection of staff views (leaders, facilitators and practitioners), participant views, my observations, and the documents created by the SPTOs. All of this data was analysed through the lens of the leadership, risk and innovation framework and interpreted in order to answer the central question and address the objectives.

4.10 Ethics

Trussell (2010) identifies three themes of "ethically heightened moments" which can emerge through a reflexive approach to research as:

(1) researcher well-being and the type of knowledge constructed, (2) encountering the unexpected and empathetic responsibility to the participant, and (3) negotiating the participant–researcher relationship upon completion of the study (pp.380-81).

A reflexive approach to the research, supported by a detailed reflective journal helped to monitor such concerns and foresee potential ethical dilemmas (Guillemin & Gillam, 2004).

Data was anonymised, with interviewees designated a unique number code. Flick (2008) argues that all data should be anonymised, including the research sites. A study of management styles in British theatre (Beirne and Knight, 2002) highlights the complexities of anonymising respondents. Beirne and Knight (2002) found that anonymising seemed initially to sanction candour and a wealth of detailed information. However, paradoxically, the report of the findings had to be tempered to ensure that confidentiality was preserved. Bailey (2007) advises care to preserve anonymity and avoid any identifiers. I recognise that this is particularly challenging in this study, given the renowned status of the publicly-subsidised case study organisations. I gave extensive consideration to anonymity and decided that, for the purpose of this thesis, it was appropriate to focus on the management issues and theories, rather than the organisations. It was also valuable when presenting the findings to refer to the contributors by their role, be it in the case studies or not, because this was the motivation for interviewing them or observing their practice and was important for understanding the inner workings of large-scale Pro-Am theatre. Therefore I felt that not naming the organisations was appropriate. Additionally, I hope that the findings of the study will be of interest to theatre managers and policy-makers as well as scholars and as such are not limited to large and prestigious organisations, but all types of SPTOs.

The study received ethical approval and adhered to Sheffield University's "Ethics Policy Governing Research Involving Human Participants, Personal Data and Human Tissue". After this procedural stage comes what Guillemin and Gillam (2004) call "ethics in practice" (p.262). They emphasise the importance of the relationship between reflexivity and ethics during the research process, with the researcher being alive to potential ethical tensions. Each method presents unique ethical concerns, which were carefully considered before proceeding, throughout the process, during the writing stage, and upon completion will be continuously considered with regard to dissemination.

4.11 Limitations

Time is an inevitable research constraint; in interview lengths, interviewees' schedules and observation timetabling. Overall I felt the large corpus of data gave a comprehensive account of the two case study initiatives. There were some financial implications to carrying out observation sessions due to travel costs. This was more of an issue for Pro-Am(B) because this involved travelling to three different cities across the UK, whereas Pro-Am(A) all took place in one city. I considered the limitations of my 'insider' position as well as the advantages. For example, the concern that my theatrical knowledge and passion for the art form could lead me to be less critical in my approach. I combatted this by resolving to never feel entirely comfortable in the field. This evokes the anthropological term of the "marginal native" (Lobo, 1990) who builds trust and develops a rapport with the research setting and participants, whilst also maintaining a critical distance. However, I also recognised that I was the research instrument and that my knowledge base was valuable.

4.12 Methodology summary

This chapter has explained and justified the methodological approach for gathering, analysing and reporting the data.

Braun and Clarke (2006) argue that writing up is a continuous process throughout qualitative research and constitutes part of the analysis. It is not all done at the end, as is more often the case with quantitative work. Notes, memos and coding ideas written from the start of the study have helped to craft the final report.

I am the narrator of the case study journey. Bailey (2007) states that in an interpretive study the researcher's voice is present in the findings and includes reflections on the process and how it affected them, as well as the analysis.

5 Findings

The following chapter presents the findings from the analysed data. They are presented in three sections, one for each principal theme of leadership, risk and innovation, and using singular case study analysis and cross-case analytic commentary. This reflects the explorative and descriptive purpose of the study. Key findings will be introduced which will be developed further in the discussion chapter, where the study's contributions to knowledge will be established. Each section will be summarised to highlight the key findings and show how the principal themes intertwine.

5.1 Leadership findings

This section presents findings regarding the strategic governance of large-scale Pro-Am initiatives in SPTOs. It addresses: the types of leaders making these decisions and the implications for the managers and practitioners charged with facilitating the projects; the correlation between leadership and artistic experience; the strategic rationale which motivates leaders of SPTOs to introduce Pro-Am projects; how this strategic decision relates to the overall mission of the organisation; and the role of flagship theatre organisations in advancing large-scale participation initiatives.

5.1.1 Types of leaders

The concept of charismatic leadership (Cray et al 2007) resonated through the data in the way that SPTO staff members and Pro-Am participants spoke about some SPTO leaders, Pro-Am project managers, directors and workshop practitioners.

The key contributor to the Pro-Am(A) case study, Int06A, had a heavy schedule which included the day to day running of the organisation as well as artistic commitments directing plays, both at SPTO(A) and other theatres. However, Int06A was accommodating of this research and enthusiastically embraced its purpose, to scrutinise the development of Pro-Am(A) with a view to understanding the benefits and challenges for SPTOs. This personal experience of communicating with Int06A tallies with the testimonies of other members of the organisation, who spoke of a generous, receptive, pragmatic and energetic leader:

***Int16A:** [Int06A] is brilliant, just brilliant for pushing all this stuff forward [...] I don't think we'd be where we were if it weren't for [Int06A's] vision of [Pro-Am(A)].*

During a Pro-Am(A) production 3 rehearsal, the observation of Int06A's directing style resonated with comments made by staff about Int06A's approach to leadership within the organisation:

Obs09A: [Int06A] *keeps things moving quickly, keeps the energy high but it is fun, relaxed and warm. [Int06A] never says anything the participants are doing is wrong or needs improving, just that it could be clearer to 'us', meaning the audience, and offers new ways to try things. The participants' input is valued.*

A Pro-Am(A) participant, who had been directed by Int06A in Pro-Am(A) production 3, reflected on Int06A's approach to managing the cast and leading the production:

Int27A: [Int06A] *leads from the front in terms of respect and support [...] kind of like a benign dictator, we're gonna do this and everybody is going to appreciate what everybody else does. It's like an artery running through. [...] It's not just about being passionate, it's also about being skilled [...] [Int06A] is so skilled in managing people [...] you are learning all the time, looking at how you manage people.*

These three perspectives show the parallels between Int06A's charismatic approach to leading the organisation and managing the creative process of a production. This resonates with the views of two expert interviewees. Int09X and Int10X were members of the learning department of a large SPTO in England which had an extensive outreach programme and was committed to engaging with as many local residents as possible. This organisation had a long history of participatory work, but using different models from Pro-Am(A) and Pro-Am(B). Int09X and Int10X were approached for an interview because their extensive experience and insight added to the case study findings. The work of their department reflected the ethos that the leader had woven into the organisation. Int09X and Int10X stated that the artistic director had been responsible for re-designing the building with a view to making everyone feel welcome, and that the theatre belonged to them. There were no 'no entry' signs and the professional work and community projects shared the same rehearsal and performance spaces. There was no stage door, just one door for everyone who entered the building, whether that was a famous actor appearing on the main stage, or a member of the public attending a workshop or visiting the café. Int10X felt that the artistic director "engenders the feeling of the building" by encouraging people to understand that theatre-makers are not a certain type, and it can be an art form for everyone:

Int10X: *I think culturally that has a massive impact on how people feel when they come here. And all of those decisions were made really consciously and really*

clearly. There is nothing that has kind of happened by chance [...] [The artistic director's] spirit is powerful.

I got a similar impression when visiting the SPTO(A) building to interview staff and participants. The energy, commitment and 'spirit' of Int06A seemed to underpin Pro-Am(A), with each staff member and participant feeling invested in Int06A's vision of the concept.

Part of the strategy for Pro-Am(A) was to raise the stakes with each production and continually challenge the participants. Int06A was invigorated by what the participants could learn from experiencing different directorial and leadership styles. Production 4 was the most ambitious to date and involved 150 participants. It was a promenade piece, which began on the SPTO(A) main stage and then took the whole audience out into the streets, with each audience member wearing headphones and the cast wearing microphones. To create production 4, SPTO(A) collaborated with a theatre company who specialise in creating outdoor work with large casts of non-professional performers. The artistic director of this company (Int18A) directed the production. I asked Int19A, another member of the company and one of Int18A's long-term collaborators, to reflect on Int18A's leadership style:

Int19A: *[Int18A] always says, bring me problems not solutions. It's so much better to go, this has gone wrong what are our options, to the team afterwards and have everybody moving in the same direction, rather than to go and fix something, come back and go, I've fixed it, and then we are all holding bits of information and suddenly everybody else's things have completely disintegrated [...] I think [Int18A] is quite middle out [rather than top-down], everybody is allowed, everybody is valid.*

When interviewed, Int18A spoke with great passion and energy about the production and the Pro-Am(A) concept. Int18A seemed to be a leader who inspired followers by being the custodian of the production and a keystone figure for the creative team and participants. As Int18A put it: *"an understanding from the centre, for us is better than an understanding from outside"*. But rather than enforcing their own vision and stamping their authority, Int18A's position was to take responsibility for practically realising the writer's vision for the production, by enabling the cast and creative team:

Int19A: *So if [Int18A] has all the information [...] or has had the ability to change those things, then that's safer, it makes for a better show. What's great is [Int18A] will say in the show "everybody freeze", and it's magical. 150 people can freeze in a moment and they are so tuned in. It's lovely.*

I observed Int18A's leadership style in action during a rehearsal for Pro-Am(A) production 4. It was the week before the show opened and there were many technical details to address:

Obs14A: [Int18A] starts the rehearsal with a speech to the cast; tells them that arranging real things in real space is the most complicated part of the show, such as placement of props and costumes etc. Asks that everyone is as relaxed and generous to each other as possible while all the details are resolved. [Int18A] promises to stand in the middle of the stage after rehearsals and answer questions until every single person's issues have been addressed. [Int18A] is constantly asking if everyone is happy, addresses groups and individuals, "any questions?" Nothing is too small. [Int18A] is funny, lots of jokes and warmth. [Int18A] also knows each participant by name - first name and surname.

The passion and energy of Int18A was evident and I was struck by the esteem within which the cast of 150 generally seemed to hold their director, or leader. During our interview, Int18A stated that the cast and crew were collectively "a gang" who were creating the production together, as equals. This was confirmed by a Pro-Am(A) participant (Int27A), who said Int18A repeatedly told them all they were "ten feet tall", and they had been made to feel that each person was integral to the production:

Int27A: that spirit of inclusiveness, this is big, we work together as a gang, and we will get there, and it will be brilliant for us and it will also be a brilliant experience for our audience. It's not self-indulgent, it's gonna be spectacular.

The Pro-Am(B) case study had two key figures who showed attributes of charismatic leadership: the producer, or project manager (Int08B), and the lead practitioner, who had conducted many workshops across the country (Int33B). The enthusiasm of these two people was vital in initially communicating the collaborative vision of the project, whilst touring amateur drama festivals and meeting amateur companies. Two interviewees from external organisations who were involved with the development of Pro-Am(B) (Int03B and Int34B) both reflected on the charismatic approach of Int08B in drumming up support for the project, stating Int08B "charmed" the amateur theatre companies. Int08B and Int33B's infectious enthusiasm for the project was evident during our interviews and my observations of their practice. One Pro-Am(B) participant (Int29B) also explained the enthusiastic encouragement which they and their amateur company received from Int08B during the project, when the lead performer in the production that Int29B was directing was taken ill the day before the show was due to open.

I would describe Int08B as a keystone figure in the Pro-Am(B) case study, similar to Int06A and Int18A. Int08B was responsible for facilitating Pro-Am(B), but despite moderating an extensive project on a national scale, Int08B was not dictatorial. Instead of a top-down approach, Int08B seemed to take the same approach to facilitating Pro-Am(B) as Int18A took to directing Pro-Am(A) production 4, which was to understand the project from the centre, enable participants and practitioners to take risks, offer a supportive presence and provide access to resources.

Charismatic leadership as defined by Cray et al (2007) was therefore evident in both case study initiatives, particularly in terms of communicating the visions for the projects to stakeholders. However, I argue that existing theory on leadership does not comprehensively cover the ways in which leaders develop and launch ambitious new initiatives and embed them within the organisation. I therefore propose that the concept of 'keystone leadership', should be added to the theory on leadership within the arts and is a core contribution of this study.

The creation of Pro-Am(B) was arguably an example of transformational leadership (Cray et al, 2007) by the then artistic director of SPTO(B). This person conceived the ambitious concept, and wished to develop a relationship between the professional and amateur sectors and discover what SPTO(B) could learn from the practice of amateur theatre-making. Interviewee Int03B was involved in the preliminary meetings for developing the concept of Pro-Am(B). Int03B stated that the former artistic director was present at all these meetings and invited amateur theatre companies to spend an entire weekend at SPTO(B), talking about what they hoped to gain from the project and how it could truly become a two-way exchange. This shows the commitment required from the leaders of SPTOs to get such ambitious projects off the ground. Int12X endorsed this reflection on large-scale Pro-Am initiatives:

Int12X: It's got to depend on genuine enthusiasm of the person leading the organisation. Unless it's got their backing and their support, it's really probably not going to work. [...] It's not going to be resourced properly and they're not going to think through all the kinds of implications [...] which are all important.

The development of Pro-Am(B) could also be seen as an act of controlled positive turbulence (Gryskiewicz, 2009). The strategic decision was made to create a project that would be a way to subvert the "gold standard" (Int13B), meaning the preconception that only SPTO(B) and

other professional organisations could deliver high quality Shakespeare productions. Int13B evoked the sentiment of the former artistic director who commented that “*a little bit of Semtex*” is sometimes necessary to create a catalyst for change. The SPTO(B) leadership team at the time felt that in order to realise the vision of building bridges between the amateur and professional sectors, the two acts of developing an ambitious national programme and putting amateur performers on their own stages would have the most significant impact.

I was struck by the different forms and styles of leadership which emerged across the data. I observed and heard testimony about leadership on a variety of levels, such as organisations, departments, projects, productions and workshops. Some people had a gregarious and energetic approach to leadership, others were more reserved. A common finding however, was the importance of ‘followers’ feeling invested, engaged, valued and understanding that each step of a process had purpose (Antonakis, Fenley and Liechti, 2011). This was evident at all levels, from an artistic director communicating the vision of the organisation to staff, or a practitioner guiding participants through a two hour workshop.

In both case studies, working with different directors and workshop leaders was an integral part of the experience the leaders wished to offer participants. The observation session extract below highlights the differences I noted between workshop leaders’ styles:

Obs05B: [Int33B] tells the participants: “I love your mistakes”, that it’s really important to make them and there are no rules. [...] [Int33B] teases them kindly, works very quickly, not afraid to push them. This is very different to the gentle, nurturing style I observed from [Int01A] during a Pro-Am(A) workshop. However, Pro-Am(A) is intergenerational and includes many participants with no experience. These Pro-Am(B) participants are all experienced adult amateur theatre-makers, who are used to being directed.

[Int33B] asks for feedback and wants to hear from everyone. If the answer someone gives to “what are you learning?” is words like “focus” and “energy” [Int33B] encourages them to elaborate. [Int33B] is giving them the tools to use in their own rehearsals.

Pro-Am participants from both case studies seemed acutely receptive to the different leadership styles of the directors and practitioners they worked with, which in some cases affected their motivation to participate. Some preferred being guided by a director with a clear vision for the final production, whereas others preferred a more collaborative way of working, where they were given the opportunity for greater artistic input. In the case of Pro-Am(B), SPTO(B) had discovered through the project’s feedback mechanism that some

participants were discontented and demotivated if a workshop leader seemed uninspiring or disconnected from the collaborative vision of the project. However for such a large initiative, these occasions were very rare and SPTO(B) endeavoured to respond effectively.

It was evident that the leadership styles of the practitioners in the room had a greater impact on the participants' learning and enjoyment than the technical delivery of the auditions, workshops and rehearsals. There was typically a direct correlation between their level of satisfaction, or in some cases dissatisfaction, with a workshop or production, and the person delivering it.

Changes in personnel can threaten the stability and development of initiatives like Pro-Am projects, particularly when participants have built up trust and a rapport with the person who leaves. The person originally hired to set up the initiative and realise Int06A's vision for Pro-Am(A) was made redundant after production 2 and around two years in the post, due to some restructuring in the organisation. One interviewee told me there was concern within the organisation about how the participants would react to this change. This was because whilst the participants were very close to the organisation, and in some ways felt like colleagues, they were not employees, and as such could not be party to the details of the redundancy process. However, they were clearly aware that the leader of their project was leaving. A letter went out to participants, explaining that the artistic director would take over the project, which received a mixed response, with some sceptical about how seriously the artistic director would take their involvement, given all their other duties. However, the artistic director directed the next production, which was welcomed by the participants I spoke to. The fact that such a senior figure not only took strategic responsibility but also directed production 3 showed the organisation's commitment to both the project and the participants. This was further demonstrated publicly with the strategic marketing decision to adorn the cover of SPTO(A)'s brochure for that season with the image of Pro-Am(A) production 3 (Doc06A). This decision came at a time of what Int14A described as a renewed sense of identity for Pro-Am(A):

Int14A: I said what bigger statement for how important [Pro-Am(A)] is, and I said I can't think really of one artistic director in the country who is directing a community piece [...] there could not be a stronger signal. I suggested that we put it on the front of our brochure.

When I attended the press night of production 4 (Obs15A), I saw both leaders of [SPTO(A)] wearing t-shirts branded with the Pro-Am production 4 logo and details. Both were a visible presence during and after the performance, showing their support for the show and the participants, as well as their commitment to the Pro-Am(A) concept within the organisation.

In the case of Pro-Am(B), there had been a leadership change at the very top of the organisation, with the departure of the artistic director who had conceived the project. Int08B stated that this was an anxious time, but having seen the positive reaction to phase 1 of the project, both internally and amongst participants, the new artistic director committed to continuing it with the development of phase 2. This shows once again that if the initiative is embedded into the organisation and there is a demand from participants, then the destabilising effects of changes in key personnel can be mitigated.

As well as the formal leadership roles, there was also evidence of informal leadership in both case studies (Byrnes, 2015). In Pro-Am(A), the informal leaders emerged from within groups of participants, who sometimes formed connections via social media, to meet up and practise dance routines or songs, or to share resources such as historical artefacts and photographs linked to the productions. In Pro-Am(B), there was a pre-existing concept of informal leadership within the amateur theatre model, whereby people voluntarily take responsibility for certain aspects of running the company. This was extended in the Pro-Am(B) model because certain members of amateur theatre groups had the task of facilitating their company's connection to the project.

I found it striking in the data that when discussing experiences of different types of leadership within theatre organisations, some interviewees used words such as “*empathy*”, “*emotions*”, “*humility*” and “*changing behaviours*”. This evokes the concept of participatory leadership (Cray et al, 2007), whereby the emotions of those charged with delivering the leaders' strategies are considered. One interviewee evoked their experience of the organisational culture created by a leader who recognised that emotion was evident across the organisation, and tried to change behaviours by taking an empathetic approach to leadership:

Int11X: how are you going to put on Romeo and Juliet, but equally [...] understanding where the finance department are coming from or what pressures they're working under [...]. Suddenly a decision is like a tapestry, you pull a thread here and the picture up there disappears [gesticulates bottom left corner and top

right corner] *empathy is understanding that you can't just carry on rearranging down here because you'll ruin someone's work over here.*

The ability to see the 'whole tapestry' and the empathy to understand how a decision to implement a new strategy or decision will have a ripple effect across the whole organisation is an important quality in leaders of SPTOs, and crucial for those wishing to offer complex and challenging Pro-Am work. This also links to the concept of keystone leadership, whereby a leader takes a holistic view to the potential impact of introducing an ambitious new initiative into the organisation.

5.1.2 Artists as leaders

An intrinsic knowledge of artistic processes is valuable when running theatre organisations, because leaders who have worked as actors and directors obviously have an understanding of what other artists need for the creative process to run smoothly. However, several interviewees stated that one of the biggest challenges facing arts organisations is succession of leadership, and how those with a passion for directing can be trained in the managerial rigours of running a building, as well as the artistic side of the organisation.

Int06A was an extremely experienced actor and director, but came into their role at SPTO(A) with little leadership experience, and so was inspired to undertake a training programme for leaders of arts organisations:

Int06Aii: There were two parts to me, there was the 'me' in the rehearsal room and the 'me' that was the leader of the organisation, with [Int14A]. And I wanted to bring them both together [...] I needed to work on my strategic thinking, and also wanted to work on being able to stand in my own authority and power, in a responsible way, find my own voice within that and then to speak loudly from it.

And really that's one of the things that [name of leadership training programme] stands for is authentic leadership, [...] building relationships with people [...] but also examining what your core values are. [...] And then, congruity, so finding what those values are then [...] doing as you say.

The leadership programme involved a variety of training events and support, such as a two week course where senior figures from across the arts world in the UK gave speeches and fielded questions, and a placement within a large organisation from a different sector of the arts to the trainee's. Int06A shadowed leaders, sat in on senior meetings and prepared reports, such as a diversity audit of the placement organisation. Each trainee was also given a mentor, who was a leader of an arts organisation from a different sector to discuss the day

to day challenges and opportunities of the role, and also a coach, to offer general support and discuss the trainee's personal goals and personality traits. The course was prescribed in part but the trainee was also given flexibility to address whatever they felt they needed.

I asked Int06A how the training programme had benefitted them and whether they had managed to unite the aforementioned 'two mes' of the rehearsal room and the office:

Int06Aii: I hope so, yes. [...] And you know, it's funny being an actor, because you're used to someone else's words and you're used to someone else's vision, the director and the writer, and you're a secondary creator. You're someone who interprets other people's visions. And as the leader of an organisation, and an arts organisation, you have to have the vision, and you have to be able to get other people to follow you, to stand by you and stand up and say, yeah I believe in you. And you don't want to do that in a way that's dictatorial. Ideally you do it in a way that allows people to voluntarily want to come with you. [...] I feel now much more able to hold staff contradictions and bring them together [...] I do feel more able, more confident and [...] I think my thinking is more rigorous.

I interviewed the director of Int06A's leadership training programme (Int36X) to gauge their opinion on why artists can make good leaders. Int36X stated the qualities artists bring to organisations include creativity, innovative thinking, an appetite for risk and empathy:

Int36X: We really value having artists on our programme [...] Leadership can't be taught. It can be learnt. [...] We are not trying to make people into something they are not.

Having embraced leadership training opportunities, Int06A was open to developing bespoke learning opportunities for other artists with leadership and arts management aspirations. I discovered through my case study of Pro-Am(A) that SPTO(A) were piloting a 'trainee artistic director' scheme. Interviewee Int07A was a young director in the early stages of their career. They had built a relationship with SPTO(A) by working as an assistant director on several productions and had been involved with some Pro-Am(A) productions, during the casting and rehearsal process. Int07A approached Int06A to ask for support in applying for an ACE bursary to shadow leaders of theatre organisations and learn how to run a building. Int06A, in collaboration with the leader of a second theatre company in the local area, where Int07A had been an intern, helped Int07A develop the proposal for the pilot scheme. The format was to spend six months at each organisation, attend high level meetings, audit and report on various aspects of the organisation and learn all aspects of running a building. Int07A explained the inspiration behind the idea:

Int07A: *You learn to be a director, you assist on shows, you do shows on the fringe, then you get your first studio gig, then you get a main house gig, then you do a few of those, then a job comes up and you apply for it, then you get the keys to an organisation or a building, but you don't have a clue really.*

You potentially have never looked at budgets before, and all of a sudden you need to think about things like; oh what's the Christmas show, and also, what are we serving in our café, and what should the poster for this show be, and also how can we attract other members of different sections of our community into the building, how do we engage them as well? Or the loos need to be changed, or we need more bars, more staff on the bars. So it's not just looking at the creative artistic side of it, it's looking more holistically at the building.

Artistic freedom can be compromised when a practitioner is given funding to start their own company or run a theatre building. There are many challenges beyond the artistic. Artists often have many qualities which make them excellent leaders, but, as in Int06A and Int07A's cases, know little about arts management. I would argue training leaders is therefore valuable to the theatre ecology of the UK:

Int07A: *in this time of not knowing when the next cuts are coming or what the funding situation's gonna be like, it feels like we now need [...] to pour money into training people. And that doesn't just mean artistic directors, it means everyone. It means finance managers and chief executives as well as actors and designers and carpenters and what have you, because at the moment there are a lot of young people that want to get involved in it [theatre], but not a lot of succession planning.*

This sentiment was echoed by Int15X, who worked in the cultural policy field as a theatre specialist, but emphasised the opinions given were personal. Int15X added that as well as learning about management processes at a micro level, a macro level understanding of the civic role arts organisations have in communities was also vital for artist-leaders:

Int15X: *You need to absolutely witness that and understand how those buildings operate, which is a far more detailed understanding than making a great play, going back into rehearsal rooms selecting a canon of work for the autumn season [...] because to be responsible for the work that happens on those stages you need to have a really good understanding of who you are making that work for. Therefore you need to understand the place, the environment, in which you operate*

Perhaps pilot schemes such as Int07A's trainee artistic director model should be rolled out, encouraging SPTOs and National Portfolio Organisations³ in other sectors of the arts to developing training opportunities for future leaders and managers, as well as future actors and other artists.

Int09X was a trained and experienced theatre practitioner, but did not direct the productions created by their department. Instead Int09X took on what they called a 'creative producer' role, and established a network of external professional directors, practitioners and other artists to carry out the SPTO's participation programme. However, Int09X's artistic background was part of the strategic approach to curating the work:

Int09X: the ideas come from us [...] we will look at the [professional] work that is happening here and we will think about what we could do alongside it, what elements of it we could draw out. What participants would suit that?

Artistic experience is also valuable in other areas of an SPTO. A fundraising manager for example, told me that having studied theatre years ago as an undergraduate made them empathetic to what happened in a rehearsal room and to the needs of the artistic work they were trying to support. It also helped with the 'storytelling' aspect of writing funding applications and selling the concepts for certain shows and projects to funders.

Int08B had a background of 'theatre-in-education' and was highly skilled and experienced in creating theatre with those with no training. Int08B was attracted to Pro-Am(B), as they had never worked with the amateur sector, meaning people with lots of experience but no formal professional training. A Pro-Am(B) practitioner and mentor, who had trained and worked as a teacher before becoming a theatre director, told me that their teaching experience had proved valuable for the organisational aspect of the role.

As these examples show, there is evidence building throughout the data to suggest that it is integral to the success of complex large-scale Pro-Am work to put the right people in the right

³ National Portfolio Organisations (NPOs) are regularly funded organisations across all art forms. They are selected by ACE through an application process. There are 663 NPOs totalling an investment of just under £1billion in the current 2015-2018 funding cycle (ACE website, 2016).

places. Whilst artistic experience is highly valuable, so are other proficiencies, such as organisational and communication skills.

5.1.2.1 The dual leadership model

Int06A and Int14A reflected on the dual leadership model often seen in large SPTOs and which was employed at SPTO(A). Their responses were congruent. Both were respectful of the other's contribution and highlighted the importance of supporting and enabling each other. While the roles did broadly divide between the artistic and business sides of the organisation, there was also a joint approach to many key strategic decisions. One example was the application for NPO status:

Int06Aii: we do it as an SMT, as a senior management team. Because we feel like we should [...] it's only four people doing it, but somehow that feels less top-down, you know? It's not the two of us sitting at the top, going, this is what it is. And I think each person on the SMT, their contribution involves discussing it with other people in the organisation.

Int14A stated that some believed the artistic director should be the overall leader of an arts organisation because art is its key output (Lapierre, 2001), but argued that the leadership and strategic planning needed to deliver the artistic output, which comes from the chief executive, is vital:

Int14A: I think we move forward because of the creative work that we're doing. I think that's what gives us the edge and it's, for me [...] it's about how I make it happen. [...] It's the process of making it happen which makes or breaks an organisation to be honest. [...] We're driven by deadlines, but so is the company that makes widgets. I mean ultimately, we don't have a business until we're presenting something in front of an audience and we have a deadline, and it's half past seven on such and such a date, and we're working towards getting it to that point.

This idea of recognising the differences yet embracing the synergy between the two roles recurred in the data. Int13B suggested that the dual model of artistic director and chief executive could be useful in other types of organisations and that a leadership model should be driven by what the organisation requires.

Data from both case studies highlighted the importance of the dual leadership model in developing the Pro-Am initiatives, as both projects had bold artistic visions and required extensive strategic planning. Int18A reflected on the relationship between the two SPTO(A) leaders when collaborating with the organisation on Pro-Am(A) production 4:

Int18A: when [Int06A and Int14A] talk, it's incredibly assured and they can talk about how they're looking forward to this process changing their working practices because they know their working practices are good [...] And they are both, I think, honest in their desire to actually see what happens, how do we work outdoors, how do we work with [Pro-Am(A)] in a slightly different way, how do we work at this scale, what does it do to us?

Therefore, whilst I saw plenty of evidence of the way the so-called business and art 'paradox' was addressed, I did not see anything to suggest tensions in the dual leadership models of the case study organisations in relation to the introduction of the Pro-Am projects. I understand that interviewees may have been keen to focus on positive aspects, but I also feel that perhaps the success of the two case study projects, and their organisations, was because the dual leadership model was working effectively, and because the artistic ambition and logistic requirements necessitated strategic input and commitment from both leaders. This evokes Antrobus (2011) on how well-managed difference between leaders results in successful organisations.

5.1.3 Strategic rationale

In this section I explore the motivation for initiating, developing and sustaining such ambitious projects. The origins of Pro-Am(A) were more modest than those of Pro-Am(B), yet the objectives were still ambitious. SPTO(A)'s rationale for creating Pro-Am(A) was to:

Int04A: create opportunities for people to work with us and perform on our stages and work with professionals, developing their skills at the same time.

The project was run by the two members of SPTOA's learning department (Int04A and Int05A). The leaders of the organisation aimed to make learning and education central to the organisation. Funding cuts had led to some streamlining and restructuring, however the leaders maintained the conviction that the department responsible for the outreach work should no longer be 'annexed' from the rest of the organisation. Several interviewees stated that the learning, or outreach, departments of their respective theatres had often been in an 'annex', operating autonomously, raising their own funds, generating marketing material and even selling tickets through their department rather than the central box office. The strategy of learning department activity going through the same departments as all other artistic output creates a holistic approach to the productivity of the organisation. This change in organisational culture was particularly integral to the success of Pro-Am(A), as it meant the vision for the project was embedded in each department.

Pro-Am(A)'s "unique identifier" (Int06Ai) was the intergenerational aspect of the project. SPTO(A) aimed to extend the reach of Pro-Am(A) by engaging the participants, or 'members' as they were referred to within the organisation, in other projects outside the organisation, such as facilitating the entrance of younger members into an initiative run by the National Theatre. This shows a long-term commitment from the leaders of the organisation to the development of Pro-Am(A) and to weaving it into the fabric of the organisation, rather than the 'box-ticking' exercise of meeting national funding requirements that outreach work can sometimes be viewed as.

Int18A was an advocate of the Pro-Am(A) concept, and the way the initiative had been embedded into SPTO(A), even before directing production 4:

Int18A: the idea of professionals and non-professionals coming together to create something that would be impossible to achieve without that equal, that amount of commitment from each [...] so we'd be doing that elsewhere anyway and this is the only one that [...] permanently exists as a commitment.

Int06A stated that not only did the programme of Pro-Am(A) activities reflect the 'professional' work that the organisation created, but the reverse was also true, with participatory work inspiring ideas for other productions. This inspiration seemed to come largely from the regional aspect of Pro-Am(A), as it was positioned as a way to forge a connection between SPTO(A) and its local participants. Int06A explained how the strategic rationale for Pro-Am(A) had been realised particularly vividly after production 3:

Int06Aii: we gave the opportunity to around 100 people, on stage and off, to participate with us in a deep and meaningful way over a long period of time and that feeling of belonging and pride, that I know they felt at the end because they told me, was very heartfelt, and there was a lot of mutual love and kindness and appreciation and gratitude.

I think people felt that they had learnt [...] how to work with such a large group of people, how to be able to project in such a space, sharing radio mics and [...] the technical choreography of backstage, the commitment needed, the discipline needed to sustain a week's worth of performances, the generosity needed actually to be in a group together, it's all of those things that are partly to do with the craft of acting, but also partly to do with the social skills of being together in a group.

This shows how the objectives to share skills and create theatre with as many participants as possible, and to develop a relationship between SPTO(A) and its local community had been achieved.

Int06A gave insight into the strategic rationale of the inclusion of Pro-Am(A) participants within in-house professional shows. I asked about the implications for future programming strategies, and whether the Pro-Am(A) participants were viewed as a strategic resource which enabled programming possibilities. Int06A argued the artistic vision was always paramount:

Int06Aiii: I think it is about, what do we want to do? If we did this, there is an opportunity here for [Pro-Am(A)], and we probably couldn't do it unless we had them [...] the plays come first and their directors come first in terms of curating a season of work. [...] [referring to two current productions featuring Pro-Am(A) members] they all share dressing rooms with the professional actors, they're considered part of the company.

on [name of forthcoming production] they wanted to find a name to call them, they didn't want to say you know "our community cast" or whatever so they just called them "legends" [laughs].

Int05A explained that the Pro-Am(A) participants in these two productions were encouraged by the directors to drop into the professional rehearsals freely, in addition to their separate rehearsals. While this was down to each director's individual discretion, it was common practice. In the post-show discussion of an SPTO(A) production involving Pro-Am(A) members (Obs15A), a professional actor publicly advocated their contribution, stating the play could not have been realised as successfully without them.

A participant who performed in several Pro-Am(A) productions and had been involved in the Obs15A production was resoundingly positive about the experience, stating:

Int27A: We'd done a few workshops together, the non-professionals. That in itself, the fact that in this theatre now we're talking about non-professionals rather than amateurs [...] so it's [Pro-Am(A)] and the cast, [...] the idea that you're some kind of filler, you know, it's not that.

I was interested in the relationships between the SPTOs and the actors' union Equity and professional actors and agents. Int06A said the reaction had been positive and was very mindful of protecting professional roles whilst also creating opportunities for Pro-Am(A) participants. Int06A and Int14A had both consulted with Equity, explaining that it was not a matter of displacement, meaning filling professional roles with non-professionals. It struck me that if this work continued, the participants might eventually want to be paid for their time and commitment, given that they were appearing for free in productions that the organisation was selling tickets for. This could destabilise the vision and mission of Pro-Am(A). I did note in my research journal however, that when interviewing participants who were

clearly emotionally invested in the project, it felt inappropriate to ask them if they felt they should be paid for their time, as if this would potentially undermine their motivation for taking part.

There were several ways for Pro-Am(A) members to make theatre and perform on SPTO(A)'s stages, such as skills workshops, appearing in a large cast of non-professional peers, or appearing with a smaller number of peers within an otherwise professional cast. These required varying levels of commitment from the participants and each offered a different experience, depending on the demands of the piece and the approach of the director. I asked Int14A to reflect on how the Pro-Am(A) model had developed, after four years and four productions. Int14A was most gratified by the relationship the participants had forged with the SPTO(A) building:

Int14A: I think there's a definite sense of belonging [...] that's what I've always wanted [...] I just think their passion and enthusiasm should rub off on us [...] to me that's, that's vital.

Having established the project and embedded Pro-Am(A) into the organisation, the continued strategic rationale was to keep challenging participants, develop their skills and offer exciting opportunities, to maintain high production values and to engage as many people as possible.

Pro-Am(B) was inspired by the simple idea to improve the relationship between the professional and amateur theatre sectors, but it was borne out of a spectacular unique event. The former artistic director of SPTO(B) was determined that the festival they were charged with developing for the Cultural Olympiad would involve both amateur and professional theatre-makers and be an opportunity to recognise the contribution of the amateur sector, as the former chief executive of SPTO(B) explained:

Int13B: we wanted to break down all the traditional barriers that had previously existed. So the first thing that we did was create [...] a festival all year round that was about inviting other people onto our stages and learning from them how they did Shakespeare. That's the first time [SPTO(B)] has ever done that, and effectively, we're changing the brand.

The concept for Pro-Am(B) then emerged from this festival. The former artistic director of SPTO(B) who conceived Pro-Am(B) was out of the country for much of my fieldwork time, so I did not seek an interview. I also felt there was enough written in the public domain about their motivation for conceiving the initiative to cover what I would have asked, plus other Pro-

Am(B) interviewees discussed their recollections of the project's origins. I also did not seek to interview the new leadership team of SPTO(B) because they took up their posts after the project had begun. I did interview a member of the senior management team (Int24B), who was responsible for the project and had worked on it since its inception. The key contributor to the Pro-Am(B) case study was the project's producer (Int08B), who was hired to lead the project when the strategy for delivering it had been established. Int08B was generous with their time and offered to answer questions on every aspect of the project. Int08B expounded the strategic rationale for Pro-Am(B):

***Int08Bi:** we wanted to change the way people felt about amateur theatre-makers. And that is why I have started using the word 'theatre maker' [...] I didn't want to change the word 'amateur' because I think it is always slightly cowardly to change the name of something when you want people to change how you feel about it.*

So we could have called them 'community practitioners' or we could have called them 'non-professional actors'. They are amateurs and that is what they are and what we have to change is the way someone looks at that word or talks about that word, particularly when it comes to theatre.

In both case studies, the rationale was not to solve an internal organisational problem, but to reach beyond the remit of producing professional plays and create opportunities for participation. In the case of Pro-Am(B) however, part of the rationale was also to bring benefits back into the organisation and into the partner theatres by engaging with the amateur sector in a collaborative way. Positioning the initiative as a national programme to exchange skills, methods, experiences and ideas was integral to the strategic rationale. In appraising phase 1 of Pro-Am(B), Doc02B states:

***Doc02B:** Over a two year period, it has reintroduced professional theatre to its amateur roots and has engaged the amateur sector with modern professional theatre.*

However, having such a broad rationale, to connect two vast sectors on a national scale over two years was problematic:

***Doc02B:** Although this made for an epic celebration of [...] work, so many productions spread over so wide a period meant it was easy for [SPTO(B)] and partners to lose track of productions, or some individual productions to feel out of the loop and peripheral to the project. A more contained time-frame falling after the skills exchanges and before the showcases would give the project more clarity, concentrate resources and aid communication.*

This supports the testimony of Int08B and Int24B who stated that the response to Pro-Am(B) phase 1 far exceeded expectations. SPTO(B) soon realised the challenge of undertaking such an ambitious project and delivering the long-term objective of affecting a sea change in the relationship between amateur and professional theatre. The organisers hoped for 50 groups, but hundreds applied, with many fitting the criteria and being accepted into the programme. This meant that lines of communication was the biggest challenge. Doc02B echoes the sentiment of several interviewees that whilst Pro-Am(B) phase 1 was received very positively:

***Doc02B:** we always described this as ‘the project we do to find out what the project is that we should be doing’ and we still have much to learn.*

The project was scaled down in phase 2. This strategic decision was taken to make the project more manageable, whilst still maintaining the maximum possible coverage across the UK:

***Int24B:** to start with we really wanted to have that impact and reach the broadest range of amateur theatre-makers, whereas in the second round we’ve been a bit more targeted and we’ve looked at the directors as the people that can feed out to the rest of the community, but the first stage was definitely about awareness, getting people to sign up.*

Large-scale participation initiatives therefore require a concise strategy, yet managers should also be willing to adapt and make incremental changes. This reflects Bilton’s (2007) theory on the need for flexibility within the system.

Several interviewees stated that SPTO(B) did not know what to expect or just how large and vibrant the amateur sector was until they started looking. They quickly found fourteen amateur groups all within only a few miles of the SPTO(B) building. Not only this, but during a staff meeting to introduce the project, the leaders asked who belonged to an amateur company, “everyone started looking around and being embarrassed, and then I would say probably about a third of the room put its hand up” (Int13B). SPTO(B) embraced this new discovery of amateur theatre-makers “in our kingdom!” (Int33B) by staging an in-house staff Christmas play. This highlights the stigma which the organisation was seeking to address, which existed within its own building as well as the across the theatre sector.

Int08B elaborated on the historically fractious relationship between SPTO(B) and local amateur companies, which had only existed through the amateurs hiring rehearsal and performance space, and was common to many SPTOs:

Doc02B: [SPTO(B)] and our partners have discovered a whole sector of theatre-making unknown to many professionals or considered irrelevant, parochial or unfashionable by others. What our practitioners and partners discovered was a grass-roots movement of theatre-making far larger and far more vibrant than anyone outside it could have guessed.

Int24B, the senior manager with overall responsibility for the project, took me back to that exploratory weekend in 2009, where around 200 amateur theatre-makers and representatives from umbrella bodies representing amateur theatre were hosted by SPTO(B), and the strategy for Pro-Am(B) began to take shape. As well as targeted and structured discussions relating to issues such as marketing and working with texts, there were also conversations around how the collaboration would work, including how to refer to the participants:

Int24B: at that point we were still calling amateur theatre-makers ‘non-professionals’ and they were like, no we’re amateurs, absolutely we own that! [...] there was proper ownership from everybody, erm and from [SPTO(B)], [name of former artistic director] was there and lots of other members of the senior team [...] there was really senior level buy in which I think was really important.

From the inception of the project the emphasis was on collaboration and improving the relationship between the sectors. An early draft of the project’s programme uses such language as: “to work holistically”, “share skills”, “gain knowledge and long-term understanding”, and “celebrate the amateur sector” (Doc04B).

In the application form for Pro-Am(B) phase 2, having developed the concept into a stand-alone project after the conclusion of the Cultural Olympiad, SPTO(B) asked itself the question: “why do we want to work with amateurs?” (Doc07B):

Doc07B:

- To develop the skills, techniques and process of amateur theatre makers, enhancing the experience of participants and audiences alike.
- To broaden public participation in theatre beyond schools and youth groups.
- To endorse and embrace the grass roots, entrepreneurial, can-do, community spirit of amateur theatre.
- To celebrate and showcase some of the great work done by amateur theatre.

- *To broaden access to the high quality resources of the UK's professional theatre sector both human and material.*
- *To encourage the re-claiming of Shakespeare by the people, as performers as well as audience, by sharing the skills and experience of [SPTO(B)].*
- *[SPTO(B)] believes many people fall in love with theatre through seeing or taking part in amateur theatre-going on to become audience members, supporters and participants in theatre at all levels, amateur and professional.*

Int08B expounded these far-reaching motivations and aspirations for Pro-Am(B), for example, by arguing it was considered legitimate to be a professional actor, or be in a youth theatre group; but when youth theatre members became too old for these groups their options were limited. These observations evoke the theories of Nicholson (2015), Knott (2015) and Cochrane (2001) who discuss the pejorative connotations of amateur theatre compared to professional theatre:

Int08Bi: what I thought when I came to this project is wouldn't it be brilliant if those guys either joined amateur theatre companies? [...] Or started their own theatre company in the same way you would start a band. You know and play in a park. And no one ever asks, are you a professional band or are you an amateur band? They just go, you are a good band.

Colleges were creating a huge generation of theatre excited/theatre literate people that we then sent out into the world to not do any theatre at all. And the amateurs were the answers. They were hungry for new people to take part and we wanted to say this is a legitimate thing to do and not turn our nose up and go, well you are an amateur now, after all that time encouraging them to make theatre.

Int03B was the head of a body representing amateur artistic practice in the UK and consulted closely with SPTO(B) on developing the Pro-Am(B) concept. Int03B stated the purpose of the weekend of preliminary meetings in 2009 was to correlate what the participants wanted out of the project and what SPTO(B) was able to give. Int03B recalled excitement at seeing the amateurs who had been invited into SPTO(B)'s headquarters *"take control and claim the space"* (Int03B). The senior level buy-in expressed by Int24B was confirmed by Int03B who remembered the artistic director being present all weekend and seeming invigorated by the event. Marketing representatives from both SPTO(B) and the amateur companies exchanged notes on working practices and this public-facing approach meant comments could be directly addressed, rather than via bureaucratic methods. The amateurs were positive yet sceptical

and there were early tensions, particularly from amateur groups local to SPTO(B), but these dissipated over the two days:

Int08Bi: I think one of the things we looked at to start with was [...] why weren't we connected to the amateurs? Why was there such a gap between amateur theatre-makers and professional theatre-makers? 1) Knowledge, but, 2) Culture between the two.

There was a multi-disciplinary approach to the event, with "fun, silly, creative" (Int03B) pitches to sell ideas presented through dramatic performances. Int03B suggested that although Pro-Am(B) was born out of a once-in-a-generation event in the form of the Cultural Olympiad, it was the opportunity of working with SPTO(B) which was an even greater motivator for the amateur companies. There was a clash in objectives initially, with the amateur participants requesting a competitive element, as in the amateur theatre festival model, where productions are judged. But SPTO(B) resisted this and did not want a competition model, with the 'winner' of Pro-Am(B) appearing on their stage, and so an agreement was reached. Objectives were set: on a practical level, to share skills and showcase amateur work; and at a higher level, to lessen the professional-amateur theatre divide. Phase 1 of the project surpassed Int03B's expectations. Some of the shows were "some of the best Shakespeare I've ever seen" (Int03B). Int03B witnessed the realisation of the collaborative rationale, when at one workshop a young SPTO(B) director was seen taking notes from an amateur director with 30 years' experience. Some of the biggest challenges were down to timescales, as some amateur groups plan years in advance, and may be in rehearsals for many weeks.

The ideas from that weekend were developed within the organisation, followed by further external consultation with Int03B and other leaders of umbrella bodies representing amateur theatre and artistic practice. Int24B explained the partner theatres for the project were selected which had a strong commitment to working with community participants, would engage with and contribute to the concept, had the capacity to undertake the project and would collectively create a national geographical reach.

A key word in the Pro-Am(B) rationale was to *offer*. Int08B said the project was about "offering access to modern theatre practice" and the amateurs had reacted very positively to this offer. "They are grown-ups with a passion for theatre. The longevity of an amateur group is to be

respected" (Int08Bi). Therefore in phase 1, SPTO(B) had a cautious approach and resisted giving feedback to the amateurs on their productions for fear it would seem condescending. However, the participants valued the mentors' and practitioners' feedback, requesting more of this in phase 2.

Int34B represented one of the umbrella bodies for amateur theatre whose role was to publicise the project, provide feedback, and act as a conduit between SPTO(B) and the amateur groups by attending the extensive programme of Pro-Am(B) launch events, then feed back to SPTO(B). Int34B reported hearing some early scepticism anecdotally amongst amateur theatre companies, that SPTO(B) were 'parachuting in' and telling the amateurs how to improve. This dissipated when representatives from SPTO(B) visited the groups to discuss the project in detail:

Int34B: it was clear that [SPTO(B)] were not only committed to the programme, but actually providing an awful lot of value, and showing a lot of respect I have to say. Because as [Int08B] said [...] somebody who in his or her day job is working in a shop or an office or on a building site or wherever, it might be they are bringing all that other experience with them when they are doing something on stage.

Int17B was the leader of a large amateur theatre, which was selected by SPTO(B) to be a partner theatre, given the additionality they could bring to Pro-Am(B) by being an amateur theatre organisation with large premises. Int17B felt the project achieved its objective to be a two-way learning experience and confirmed Int08B's testimony that phase 1 of the project was about trying to make the idea work for everyone, and that phase 2 was more focussed. Therefore, even though the strategic rationale for Pro-Am(B) was extremely ambitious, SPTO(B)'s commitment to the collaborative, reciprocal aspect and endeavouring to communicate this clearly to stakeholders was integral to delivering the project.

Int33B believed that one element of the rationale for Pro-Am(B), to create a flow of skills from the professional to the amateur sector, had been successful:

Int33B: in the five years that this has been going I have seen a step change, I now go to companies and the game is much higher, everything is tighter, brighter, lighter, more economical and it's been a joy.

I mean you knew [...] you were going to get a group of people who are really passionate, really committed, incredibly dedicated, and they know how to make theatre. Some of these are established for a hundred years or more. And in that set-up what I think people forget is that they are professionals already. [...] for me

it's very humbling because we sort of do the one thing. And they do ten, and multiple things [...] And that's what I love about this community.

This shows that a renewed appreciation for amateur practice was emerging amongst the creative team. The new leader of SPTO(B) arrived at a pivotal time for the project, and took the strategic decision to sustain it and apply for a new round of funding, committing to the project for another three years. The project had clearly proved its value, both to the organisation and the participants, to such an extent that it inspired a new large-scale Pro-Am project which was led by a senior figure at SPTO(B). This project has not been explored in-depth, due to the parameters of the case study, but I did attend a rehearsal (Obs16B) and subsequent production eight months later to gain an understanding of the legacy of Pro-Am(B). This follow-up project showed the continuing commitment of SPTO(B) to the Pro-Am concept.

In addition to the specific strategic rationales of each case study Pro-Am project, several interviewees commented on the broader motivations for undertaking large-scale participation initiatives in SPTOs. Int15X suggested that leaders were becoming increasingly inspired by the artistic possibilities of creating work with large numbers of local participants:

Int15X: ultimately we understand that the relationship between audiences and what happens on the stage is changing [...] the need and the desire for interactivity, the desire to contribute.

Both Pro-Am case study projects were deemed an overall success by the organisations and participants. This raised the question of a cultural policy intervention, whereby SPTOs become obliged to develop some kind of model of large-scale participation. Some interviewees advocated this step, others were more cautious, stating there was an existing expectation for funded organisations to create participation opportunities. Large-scale Pro-Am work could be a mechanism for delivering this. However, if the organisations were ultimately using 'art' to deliver these opportunities, then it was not the role of policy-makers to prescribe the artistic output of SPTOs, for example, by dictating that an SPTO must create a production with a cast of 100 local people:

Int12X: I think if funders just add to the list, we expect you to do this, that's probably going to be counter-productive, but if funders can say, explain to people why the world is changing in this way and say how do you adapt to it because people can adapt to it in different sorts of ways [...] it doesn't have to be necessarily through performance work the entire time, it can be through programming, it can

be through, well any number of ways obviously, of joining in the way places work and the way buildings are used.

This view of public policy supporting rather than enforcing these kinds of initiatives was supported by Int11X:

Int11X: I think policy should be funding it and supporting it. But in so far as it's necessary, or in so far as it is led and determined by the appetite and will of institutions and the people around them who want to engage.

Int38X's response to my question on the need for a policy intervention added another dimension to this debate:

Int38X: one of the questions a theatre needs to ask itself is, how is it serving people? And that includes the audience it is currently serving, but also all those people it is currently not serving.

Int38X suggested that large-scale participation initiatives in SPTOs could be viewed as a way to improve diversity in the arts, which ACE and local councils could encourage. However, Int38X cautioned that these projects should not be viewed by funders as a less-expensive way to do social work, given that the social benefits of arts participation can be extensive.

As one interviewee put it when I asked whether more organisations should be encouraged to offer similar initiatives to Pro-Am(A), *"we'll definitely get some bad ones."* My view is this does not mean that SPTOs should not try, but there needs to be a wider discussion on the challenges and best practice of these initiatives, which this thesis and its subsequent academic output will contribute to.

Int11X and Int12X extolled the belief that the arts world should align itself more with the public than politicians and funders as the public are not only the beneficiaries but also the funders of subsidised work in the long-term, a comment echoed by SPTO leaders in both case studies. Arts organisations that are supported by enthusiastic participants can make a strong case for continued public support. This sentiment was supported by Int13B who said it is important to democratise the industry more by finding new ways for people to *"touch theatre"*, as this is how people feel engaged and connected to their local organisations and will therefore be more likely to support them and rally against funding cuts. This could be part of the wider legacy of Pro-Am initiatives, if they enable participants to form strong connections with their local professional theatres.

5.1.4 Mission and vision

One leader stated that ten years ago they would not have engaged with the concept of a mission statement and vision, because creative organisations are fluid and it can be difficult to crystallise their output in this way. However this interviewee had since realised the importance of a mission and vision which everyone in the organisation is invested in and of ensuring that any changes in the organisation align with the mission and vision.

Large-scale Pro-Am initiatives require a clear vision and mission statement which are linked to those of the organisation. This helps staff to understand the rationale for the project and the role of each department and person in delivering it:

Int06Ai: it links directly to [...] the mission of the organisation, to change people's lives [...] We believe that live performance changes people's lives and erm our mission is to create opportunities for people to see live theatre experiences which moves them and that's to laughter, tears, thought, and make them think differently about the world, and about their own lives in the world.

[Pro-Am(A)] has the same over-arching mission, it's just that [...] it focusses more on creating opportunities for those who live and work in the region to create work that changes lives. It was important to me that both mission statements were linked. [...] To have a holistic approach to everything that we do.

Int06A had been working with heads of department on a strategy to renew the organisation's overall vision:

Int06Ai: to make sure that everyone feels that they own the vision of the theatres. That it's not just me from a top down point of view saying, this is what we stand for.

The process for this was that each head of department consulted their teams then explained their challenges, hopes and concerns. The leaders processed all this information, then wrote a proposal, which was then discussed and revised until each word was agreed upon. This is an example of participatory leadership (Cray et al, 2007), whereby staff members are included in a decision-making or strategy development process, the implications of which directly affect them.

Similarly to Pro-Am(B), a concise mission and vision for Pro-Am(A) was developed after the project became established. The Pro-Am(A) mission statement (Doc05A) used language like "invite" and "embrace", and, like Pro-Am(B), talked about "offering" opportunities. Strikingly, in Doc05A the participants were referred to only as "members", but the word "professional"

was used, which arguably bestows an 'otherness' upon the participants and signifies they are non-professionals. The word 'amateur' was a challenging term for some SPTO(A) interviewees. Whilst there was a consensus of respect for the amateur companies in the region, the term was largely rejected in relation to Pro-Am(A), as if it would somehow burden the participants with negative connotations, or separate them from the rest of the work being created by the organisation. Contrastingly, the term 'amateur' was central to the mission of Pro-Am(B), and was scrutinised then embraced by SPTO(B).

There was also some discomfort with the word 'professional' amongst SPTO(A) interviewees when describing productions involving only professional casts. I felt this was because the Pro-Am(A) productions were afforded all the same production values as professional shows and were a source of pride for staff, and so labelling certain shows as 'professional' could suggest the Pro-Am(A) shows were somehow 'unprofessional'. This shows how the boundaries are blurring between the commonly accepted definitions of 'amateur' and 'professional' theatre. The complexities of the terms 'amateur', 'professional' and 'Pro-Am' are addressed in the discussion chapter of the thesis.

Like SPTO(B), SPTO(A) developed the concept for the Pro-Am project, then realised that a designated member of staff would be needed to administer and facilitate it. The job description for this role at SPTO(A) (Doc03A) included a statement about the importance of growing the project and cultivating relationships with stakeholders in accordance with the business plan and development plan of the organisation. This shows the degree to which the initiative was embedded in the long-term strategic plans of SPTO(A).

The "*holistic approach*" (Int06Ai) to Pro-Am(A) was evident not only through the testimony of the interviewees, but triangulated with documents such as the production programmes, which started as a black and white folded piece of paper with basic information for production 1 (Doc01A), then four years later, had become a colourful, glossy, thick booklet which perfectly resembled programmes for professional shows (Doc12A).

As part of the on-going evaluation process of Pro-Am(A), each participant was asked to complete an extensive feedback form, tailor-made for each production. This process was first introduced after production 3. The feedback form for production 4 stated:

Doc11A: Part of the mission for [Pro-Am(A)] is to transform people's lives by offering bold, passionate and enriching collective experiences of live theatre to everyone. How did we do?

Participants were then encouraged to reflect on the experience and elaborate on if and how the production made a difference to their lives. This could be written on the form or filmed and submitted as a video response. SPTO(B) used an external auditing body to assess the impact of Pro-Am(B) and conduct in-depth interviews with participants and other stakeholders. This shows a commitment to objectively evaluating and then improving the projects.

As well as the opportunity to appear in a production on its stages, the Pro-Am(A) vision extended to those who were not successful in securing a role through the audition process. These people were offered the chance to partake in workshops run by the artistic director and other creatives. They were also referred to as 'members', whether they had been in a production or not, to signify they were still valued as part of Pro-Am(A).

Members could be as active as they wished. However, it was ultimately up to Pro-Am(A) facilitators to arbitrate who took part in productions and other activities, which could suggest the initiative was not as inclusive as it seemed. Interviewees argued that, because every activity was heavily over-subscribed, any selection of participants was simply a matter of scale and was informed by the sheer numbers that could be accommodated.

Part of the vision for Pro-Am(A) was that the participants' engagement with the creative process would be meaningful, and large-scale productions would not simply be a matter of crowd control:

Int06Ai: a major component of it for me is to ensure that the people who participate, the people who live and work in this region [...] will increase their sense of emotional investment in this place. [...] it's their theatre [...] It's everyone's theatre, you know everyone pays for it [...]

This idea of creating art 'with' people rather than 'at' them resonates across both case studies. Working collaboratively and generating a sense of ownership of the work and the space were integral objectives and motivators for undertaking the projects. Achieving this seemed to benefit both the participants and the organisations.

Int08B stated that their Pro-Am work had been integrated into the overall mission of the organisation, and hoped the Pro-Am(B) partner theatres would be encouraged to do the same. This would be a significant step in realising Pro-Am(B)'s mission:

Int08Bi: It is [...] in our new set of mission statements. [To create work with] young people and emerging artists, new writing. The third kind of sector of that has been amateur theatre-makers. So we will hopefully see that in lots of other theatres as well.

This is also another example of the two-way exchange that formed the rationale for Pro-Am(B) and the vision that SPTO(B) and the partner organisations would be affected by the project, leading to a sea-change in the relationship between the amateur and professional sectors. Int08B hoped that an outcome of Pro-Am(B) was that other SPTOs would be encouraged to augment their mission statements with the declaration to work with amateur theatre companies and other adult theatre-makers who had a pre-existing passion for the art form, “and see them as a constituency to continue working with” (Int08Bi) as well as other members of the local community. Int08B noted: “we don't have a project promoting the idea of young people working in theatre” (Int08Bii) and so hoped that links between professional theatre organisations and non-professional theatre-makers would become more conventional:

Int08Bii: Yes that's changed since we have been doing it and we would like to see that change elsewhere. To see them as, to see them, to recognise them [...] So each regional theatre to see them as part of the landscape of things that are going on in their area, that they can engage with.

Two external expert interviewees stated that in their organisation there was one central mission statement and no separate mission for the learning department or participation projects, which had both positive and negative implications:

Int10X: it is very integrated, the mission statement, which is that everybody is invited and you don't have to behave in a certain way when you are here.

Int09X: it is such an important part of the ethos of the building [...] the diversity of our audience and the diversity of the people who use the building [...] what is interesting is the thing that we find difficult [...] we don't have a dedicated space [...] the reason that we don't have one is that when they did the redesign they felt that our work shouldn't be given a separate space. It should use the same space as the professionals. So ironically that sometimes means we then can't actually do a project. So it has sort of worked and it sort of hasn't, but it is a good reason.

Therefore perhaps a separate mission statement for significant projects such as large-scale Pro-Am work is advisable for SPTOs, as a way to ensure that all the needs of the project are addressed. However, this should align with the overall mission of the organisation.

Int11X advocated the importance of not only having a clear mission, but also of testing it every so often. The data shows that, predominantly due to the scale of the initiatives, introducing the two Pro-Am case study projects tested the overall mission statements of their respective SPTOs.

5.1.5 Flagship cultural leadership

In this section the data is used to explore how renowned organisations like SPTO(A) and SPTO(B) can be agents of change through the development of large-scale Pro-Am work.

Int36X stated that, like Int06A, a senior figure at SPTO(B) had also come through the aforementioned leadership training programme and was “*a real change maker*” (Int36X). This leader had just embarked on the extensive and elaborate Pro-Am project which had been inspired by the success of Pro-Am(B). Int36X gave another example, of a leader of an art gallery who undertook a placement at a theatre where they observed a rehearsal and studied the way a director worked with an ensemble of actors, then employed this collaborative way of working and decision-making at the gallery. Leaders of flagship organisations can be change-makers, but not only within their own organisations. Those who take risks and are ambitious can instigate changes in practice.

One external expert interviewee (Int38X), a renowned theatre commentator and critic, championed organisations which adopted the aforementioned ‘holistic’ approach to learning and outreach work:

Int38X: people like [SPTO(A)] for example have absolutely understood the idea that you don't have outreach departments or education departments run completely by people who have nothing to do with the artistic theme of the theatre [...] and I think any organisation that is operating in that way is not operating in the interest of the local community or indeed in their own interest.

This highlights the importance of SPTOs positioning themselves as part of the wider theatre ecology, rather than being inward-looking. Incorporating the learning department more holistically into the organisation is something that other SPTOs could emulate. Pro-Am(A) was integral to SPTO(A)'s bid to be regional theatre of the year. When the organisation was

granted this accolade, a large banner announcing it was put up in the main foyer. This banner showed images of a highly successful professional musical and a Pro-Am(A) show. The two were given equal standing. This, like putting a Pro-Am production on the front of the season brochure, made a bold statement about how the learning department and Pro-Am(A) had been woven into the fabric of the organisation. As one staff member put it:

Int28A: you can't draw a line around what [Pro-Am(A)] is because it really has bled into and become part of who we are and what we do. And I think that's quite unique actually.

SPTO(B) recognised that in their role as a flagship organisation they could forge relationships with a network of regional theatres and amateur companies through Pro-Am(B). I asked Int08B about other potential implications of Pro-Am(B) for the future, evoking my personal experience of professional actors being discouraged by agents to put amateur experience on their CVs:

Int08Bi: sadly you would still not recommend them to do it. [...] I would like to see a world where you would. And directors you would as well, going, I have directed a massive show. I have directed Kiss Me Kate with the so-and-so amateurs. I know how to handle a large cast [...] as opposed to, I have done sixteen two-man shows at [small fringe theatre], with a couple of professionals. So I would like to see more of that crossover between the two. [...]

And one of the powerful things [...] about being here at [SPTO(B)] is that brand is really useful to affect change. So if [SPTO(B)] is working with amateurs then the other theatre companies do go, perhaps it is okay to work with amateurs. And loads of them, to be fair, loads of them were already doing [...] some really interesting work with their amateurs. I think this has been a zeitgeist.

Two interviewees roundly advocated the acceptance of amateur work on professional CVs. Another interviewee advised caution, given that it is hard to define precisely what 'amateur' work means, which could lead to something of a 'free-for-all', and that whilst the amateur artist should be celebrated, the professional position should also be protected.

One leader stated the importance of "demonstrating our true value by the relationships we have with our audiences and our communities", and that sometimes a bold statement is needed to affect change. The opportunity afforded by the Cultural Olympiad to create a bold and ambitious project was the catalyst for Pro-Am(B):

Int13B: we're a national organisation, we should have a national relationship with the amateur sector [...] not just [the amateur groups in [SPTO(B)'s location] getting

onto our stages, but it's about possibly the world amateur movement going onto our stages. But let's start with a national programme.

So perhaps only an organisation of the scale of SPTO(B), and with such a strong brand identity could, and therefore should, undertake a project as ambitious as Pro-Am(B). It came out of a once-in-a-generation event and inspired another large-scale collaborative Pro-Am project, so it will be interesting to see if and how SPTO(B) continues the momentum to improve the relationship between the two sectors.

The introduction of new audiences into the theatre is also a significant part of the legacy of Pro-Am work. One interviewee told me that the Pro-Am project had brought people into the building for the first time, who had 'touched' the organisation in a different way, by coming to see the work of a friend or family member. There was a general consensus that broadening the conversation about theatre amongst the public was part of the remit of a funded organisation, and that SPTOs were under constant pressure to justify their subsidy, because being publicly-funded is to be publicly-accountable.

Flagship theatre organisations can also promote diversity through Pro-Am work. The initiatives can encourage participation from the wider locale of the SPTO and remove barriers to participation, as in the case of Pro-Am(A), where auditions and workshops were held in community centres and other locations to try to engage participants who may have felt intimidated by entering the SPTO(A) building. This shows how SPTOs can avoid *"talking to the same people"*, as one interviewee put it. The programme for production 3 (Doc06A) shows the success of SPTO(A)'s strategy to widen their engagement with the local community, because out of the cast of 91, 63 were new to Pro-Am(A).

One interviewee from the amateur sector shared a cynical view on the rationale for Pro-Am theatre in SPTOs, claiming that some organisations were motivated by the economic benefits of developing associations with amateur companies and local communities in order to increase audiences. In the case of SPTO(B) in particular, this interviewee felt that if they were not obliged to do outreach work as a funded organisation, they would *"pull up the drawbridge"*. However, this interviewee also said the amateur companies could do more to engage with these types of opportunities as they are often *"too ensconced in their own little worlds"*, and that *"when it works it can be fantastic for both sides."* This interviewee was also keen to exploit any new-found relationship between amateurs and professionals as a way to

initiate conversations on how diversity and gender equality could be improved in both sectors.

SPTO(B) made a conscious decision that they could either embrace or shun the term ‘amateur’ and decided to embrace it, in the hope that if such a well-known organisation celebrated the amateur contribution to the theatre ecology of the UK, then others would follow:

Int08Bi: I think that eco system, [...] they have been the Galapagos Islands of theatre [...]. I get a feeling you would have found more anger about that earlier, more friction between professionals and amateurs. What I think there is, is just distance now.

SPTO(B) saw it as their duty as “one of the biggies” to create Pro-Am(B) and be a catalyst for change in the relationship between professionals and amateurs and to enhance the civic role of their building, in the hope of instigating conversation around more organisations doing the same. This improved relationship was also identified as an internal benefit to the organisation:

Int24B: new partnerships, new working relationships, so partnerships with the partner theatres round the country, people who work in those partner theatres, us getting to know them better, us getting to understand how they work and what the challenges are from their perspectives [...] and obviously us learning more about the amateur theatre sector, us learning about what they do really well and how we can be fleet of foot and learn from what they do, so it genuinely is a two way exchange, it's not just one way.

The ingrained attitude to amateur work by the professional sector is something that an internationally renowned organisation like SPTO(B) can highlight and perhaps change. However, several interviewees raised the concern that flagship enterprises should not ‘parachute in’ and create large-scale initiatives without a planned legacy and long-term commitment to working with the amateur companies or individual participants. Int15X noted that if changing people’s lives through the power of art is the mission of an organisation and they achieve that through a particular project, then they should have a strategy in place for what happens next:

Int15X: because that's what participation is about, how you get there, and that means many different things to different people. [...] you have to be very clear about how and when that ends, and what you are likely to come out of this with. And [...] if it's about experience and it's about having a fantastic time, it's about learning about that process, if it's about feeling more comfortable walking into the theatre, or if it's about going and seeing other work and, oh okay I understand the

process that's involved there now [...] there are a suite of things that are going to impact on those participants.

Flagship organisations should therefore approach ambitious initiatives involving large numbers of participants with a clear vision and duty of care, otherwise the impact could be more negative than positive. Other organisations would be less likely to undertake similar projects if a flagship organisation created one which was poorly-received.

5.1.6 Summary

This section has presented findings regarding the leadership and organisational governance which were evident in the introduction and development of Pro-Am(A) and Pro-Am(B). Leadership is a central theme in this study because it occurs at every stage of the process of creating large-scale participation initiatives. Across both case studies were examples of leadership of organisations, departments, projects, productions and workshops.

Both case studies showed examples of leaders who 'led from the centre'. These people were more like custodians of a production or project than leaders, positioning themselves as keystones, holding ultimate responsibility whilst supporting risks taken by both the 'Pros' and the 'Ams' in the Pro-Am models, and enabling their practice with access to resources. The concept of 'keystone leadership' is therefore a significant contribution of this research and will be explained further in the discussion chapter. It is particularly pertinent when introducing innovative and ambitious new initiatives into an organisation.

Within the data were examples of charismatic, transactional, transformational and participatory leadership styles. 'Followers', whether staff members, professional practitioners or amateur participants, responded more intensely to the style of leadership than the content of what the leaders were conveying. Participants were often motivated by the ways in which workshops and rehearsals were run. Staff and participants were more likely to 'follow' a leader who gave them ownership of a project and valued their contribution.

An artistic background is valuable for leaders of SPTOs in terms of risk-taking, creative thinking, problem-solving, and storytelling. There are correlations between the way artist-leaders run a rehearsal (directors) or a production (stage managers), and a building. Addressing the issue of succession and training leaders of the future in the rigours of arts management and running a building are valuable to the UK's theatre ecology.

A clear rationale and strategy are vital for introducing ambitious new initiatives. All departments of an organisation should be involved, such as the learning, marketing and fundraising departments, with no 'annexes'. This helps to establish the project and garner support both inside and outside the organisation. A concise vision and mission statement for the project which align with but are separate to those of the organisation are valuable. These help determine not only the project's purpose, but the resources needed to deliver it. Feedback mechanisms are also constructive; talking to participants, valuing their input and making incremental changes, whilst staying true to the vision can bring success and longevity.

Pro-Am(A) was positioned as intergenerational, open to those with an interest in theatre or with no theatre experience. It offered skills development and meaningful arts engagement opportunities to local people. Pro-Am(B) was positioned as a national celebration of the amateur contribution to the UK's theatre ecology, a way to share skills and an exchange of ideas. Both strategic rationales reached beyond the organisation, and were not about internal problem-solving. Both projects triggered organisational change, although this was not part of the rationale for introducing the projects: Pro-Am(A) instigated a renewed integration of the learning department at SPTO(A). Pro-Am(B) instigated discussion about a change in the central mission of SPTO(B) to include a relationship with amateur theatre, and inspired another ambitious Pro-Am project. The data therefore shows that flagship theatre organisations can be change agents. SPTO(B) purposefully aimed to change attitudes towards amateur theatre and its relationship to professional theatre, changed its brand by working with amateurs and hoped others would follow its example. SPTO(A) did not have the same ambition but interviewees were enthused by the prospect of other SPTOs adopting the model.

The implications for these findings and their relation to the literature is explicated in the discussion chapter. Having considered the theme of leadership in relation to large-scale participatory initiatives within SPTOs, attention now turns to the types of risk involved in the projects and how the identified risks can be mitigated.

5.2 Risk findings

The data suggests that large-scale participation initiatives present a complex set of risks which SPTOs must evaluate and mitigate. The reaction to these risks determines whether this

strategic direction is an opportunity or a threat for the organisation. The most prominent types of risk identified and explored in this part of the findings chapter are: the artistic risk of involving non-professionals in creating the dramatic product, and of co-production; the reputational risk of associating an established brand with amateur work, which can have pejorative connotations, or of seeming to ‘parachute’ in without an exit strategy or plan for a positive legacy; the financial risk associated with funding the projects; and the operational risk of maintaining good communication amongst all stakeholders, balancing the artistic vision with the logistic demands of large-scale projects, and offering an adequate amount of pastoral care. The perceived risk of the participants is also considered. As previously stated, although the study is rooted in the organisational perspective, it is beneficial to obtain a brief insight into the participants’ reactions to the SPTOs’ Pro-Am offerings.

5.2.1 Artistic risk

Managing artistic risk is intrinsic to running any theatre organisation. It must be considered when planning all creative output, from productions to outreach initiatives, fundraising activities and other events. For example, an artistic director programming the season of a producing theatre may decide to stage a particular play. It is then marketed perhaps on the strength of the play itself, or because a well-known actor or director is attached to it. However, the final product does not usually exist at the point when tickets become available. So there is a high level of risk involved in ensuring that the production realises the director’s vision and fulfils the artistic director’s objectives for selecting it. Similarly, when participation initiatives are marketed to the public, the organisers cannot know how many people will take part and what their levels of commitment or ability might be.

Pro-Am(A)’s inaugural production was written by a professional playwright, incorporating ideas from workshops in which the cast had shared personal experiences of the play’s subject. This was designed to give the cast a sense of ownership of the piece and investment in the content, but was an artistic risk, given that the participants may not have engaged with the process or shared their experiences. Additionally, another group of participants, all with different experiences, would have created a different end product. This unpredictability is also, of course, what makes theatre a dynamic art form and this artistic risk was managed by the organisation by appointing a skilled and experienced creative team.

The concept for production 2 was arguably an even greater artistic risk: “we put it out to public writers” (Int01A). The play comprised a series of ‘mini’ plays, some written by what Int01A called “public writers” and some by professional writers. The brief was to write a short play inspired by SPTO(A)’s locality. Scripts were selected and developed by SPTO(A) and the whole piece was overseen by a professional playwright, which Int01A said gave the piece an editorial arc. This shows how the Pro-Am relationship operates at different levels, not only amateur performers working with professional directors, but also amateur writers being mentored by professional playwrights. The professional writers were commissioned and paid a fee. The public writers were offered theatre tokens (redeemable at any UK theatre) and the chance to have their piece developed and performed on a professional stage. This was deemed the most appropriate approach by the organisation, to offer the public writers a gesture for their efforts, but demarcate them from the professional writers.

One of the public writers (Int02A) shared their experience of the process and gave the writer’s perspective on the Pro-Am relationship:

Int02A: It was a brilliant opportunity to be involved with. [...] I couldn’t have asked for any more really. They put a play on that I’d written [...] there was a lot of discussion with [the professional playwright] which really did help. And lots of back and forth with [the director], about putting this in and trying that out, and it always helps to have a second opinion, someone who’s not just a sycophantic friend and does want it to be good for the sake of it being good.

Int02A appreciated the rigour and pressure within the process, wanting the end product to be as strong as possible, but also felt supported and enjoyed the collaborative approach. This testimony shows how SPTO(A)’s central objectives for the production were achieved. First, the process offered skills development opportunities to the writing participants as well as performing participants. Second, the product of a brand new show was created celebrating the local area, which was written in part by, and starred, local residents. Pro-Am projects can offer artistic opportunities other than performing and stage management, but in order to mitigate the risks of artistic ambition, investments should be made by the organisation in a skilled creative team.

The artistic risk of the link between Pro-Am work and new writing was elucidated by Int06A regarding production 3:

Int06Ai: it’s a brand new play and it’s all going to be in their hands.

All the Pro-Am(A) productions were specially commissioned and therefore unknown entities. This is a key difference from the traditional amateur theatre model of staging pre-existing plays, and often ones with which audiences are familiar. There are always implications for audience development to be considered when staging new work, as some audiences will be put off by the unknown, and others enticed by it, but there was a distinct artistic risk in putting a play on the main stage which audiences did not know, with a cast of non-professional performers. The professional playwrights writing in Doc06A and Doc12A and interviewee Int32A all stated that large-scale participatory projects present exciting opportunities for playwrights. However, it is then up to the creative team to work with the participants to create high quality productions, which is certainly a challenge with such large casts.

Large-scale participation initiatives can create opportunities for professional writers, directors, other creatives and of course, the participants to create powerful theatre on an epic scale. However, there is also pressure on SPTOs to create theatre which has high production values, speaks to the community they serve, and can stand alongside their professional work. The professional playwright (Int32A) who was part of the theatre company which collaborated with SPTO(A) on Pro-Am(A) production 4, extolled the importance of quality in order for participatory theatre to have social benefits. In one of the company's previous productions free tickets had been given to local residents who had never been to the theatre. However, Int32A cautioned:

Int32A: [the productions'] usefulness is totally irrelevant, without the work being of the first rank. So that's what it's about [...] That's at the centre.

Whilst large-scale theatre can be epic, there is also a significant artistic risk that a play involving a cast of 100 will not have the same quality as one with a much smaller cast; that it will look chaotic or the themes be unclear. Int01A stated that what makes directing large-scale participation productions, exciting but also artistically risky, is that it is all about "embracing the chaos" and trusting in one's own experience that the production will come together:

Int01A: It's like steering a bus full of very creative passengers and you hope by the end of the destination everyone is still on board and happy.

Other analogies I heard are that the director weaves a basket, or creates a box for the participants to 'rattle around in'. In other words, it is about creating a framework, which the

participants feel is a safe environment, but allows for creative expression, without being too restrictive, which resonates with Simon's (2010) theory on the benefits of 'scaffolding' participatory activities. This reiterates that skilled and experienced artists and facilitators are integral to the creation of such projects and suggests there may be dangers in a prescriptive policy intervention stipulating more SPTOs must offer large-scale Pro-Am work.

In Pro-Am(A) non-professional participants were invited backstage as well as to perform and write, which shows the broad remit of the project:

Int01A: we're also recruiting as we did last year, assistant directors, production, techies, stage management etc.; people to work with our professional team.

These participants were mentored by and worked alongside professional staff members, but there was an element of artistic risk in delegating responsibilities for the practical delivery of the production to untrained members of the public. I would suggest that in the case of Pro-Am(A) the quality of the final production was not at risk because of the talent or ability of the untrained participants, but because of the scale of the shows and size of the casts. This was mitigated by skilled personnel, detailed planning and a strong infrastructure.

In the Pro-Am(B) model, the participants were supported by professional mentors from each partner theatre who facilitated and ran skills workshops. The participants then created their own productions within their autonomous amateur companies, which were performed either in their regular performance spaces or in a variety of venues within the locality of the partner theatres. In accordance with Pro-Am(B)'s rationale for amateurs and professionals to work together, there were additional diverse collaborations between the partner theatres and amateur companies within the project's boundary:

Doc02B: Each of the partner theatres consolidated their new-found experience of amateur theatre with collaborative theatre-making projects. Led by professional practitioners, these projects saw amateur and professional collaborate to make small-, medium- and large-scale pieces of theatre.

SPTO(B) held the partner theatre role for their region as well as running the overall project. In what Doc02B called the "local legacy" of Pro-Am(B), SPTO(B) staged annual showcases of extracts from the amateur companies' productions on their main stage. SPTO(B) offered support in the areas of lighting, costume and directing to pull the extracts together into one production with professional production values. One of the Pro-Am(B) participants (Int29B)

who had directed a play with their amateur company for the project and then been invited by SPTO(B) to take part in the regional showcase at SPTO(B) several months later, opted to write a brand new piece, rather than choose an extract from the previously performed play. This was for two reasons. First, to maintain the ensemble feel, whereby there were no 'stars' and everyone was equally valued, an approach for which Int29B credited the Pro-Am(B) process. Second, Int29B wanted to give everyone involved the chance to work on the SPTO(B) main stage. However, writing an original short play proved a time-consuming and stressful experience:

Int29B: Well I took the easy way out emotionally, which was to include everybody. But I then had a hell of a job writing a piece, I had to really write a little play which included everybody. On reflection it was entirely the wrong thing to do.

I attended a regional showcase (Obs13B) at SPTO(B). I enjoyed Int29B's original piece and was intrigued by how it had been created, which is one of the reasons I contacted this participant for an interview. So it could be deemed an artistic risk which paid off, because, despite Int29B's concerns, the creation of original work inspired by Shakespeare's plays was one of the objectives of Pro-Am(B).

Both case study projects encouraged artistic risk. The job description for the person recruited to administer and facilitate Pro-Am(A) declared the objective to "*plan and implement a bold and artistically excellent programme of work across the city and at [SPTO(A)]*" (Doc03A). In the participants' application form for Pro-Am(B) phase 2, the project was described as "*the perfect opportunity to try something new*" (Doc07B). Doc07B encouraged amateur groups to apply even if they had no experience of Shakespeare, or to create a brand new piece, and encouraged individuals who wanted to take part but did not belong to an amateur company to join one, or even try "*starting a new society with friends*" (Doc07B). The Pro-Am(B) phase 1 report gives examples of the project's success in enabling new-found artistic risk within the amateur companies, as one participant described:

Doc02B: [Pro-Am(B)] gave us the excuse we needed to take a massive risk [...] Even in amateur dramatics it can be sometimes a little difficult to do something different, but this project gave us the excuse we needed.

It was repeatedly evident across the data that an organisation's strategic rationale can only be realised with the right personnel. There is a total reliance on voluntary participation for

Pro-Am initiatives. Int29B highlighted the artistic risks which amateur theatre groups deal with on a daily basis and therefore became part of Pro-Am(B), such as losing the lead actor the day before opening night. Although the amateur groups may be used to dealing with this kind of artistic risk in their regular practice, the stakes were arguably higher than usual given their association with this nationwide project, and so the support of SPTO(B) was clearly valued by them.

In phase 1 of Pro-Am(B), SPTO(B) embarked on a full-scale production which was directed and facilitated by SPTO(B) staff, was performed on one of the organisation's stages and involved a 30-strong cast of amateur performers. Rehearsals took place every evening for seven weeks and "*resembled as near as possible an [SPTO(B)] process*" (Doc02B). This is a direct correlation with the one aspect of the Pro-Am(A) model, and similarly carries the artistic risk of the pejorative connotations of the artistic quality of amateur theatre amongst audiences. This risk is best described in relation to the regional showcases:

Doc02B: for many partner theatres including [SPTO(B)] finding an audience for these events beyond the groups themselves proved one of the most challenging elements of the project. We discovered that perhaps understandably audiences for amateur theatre were very local to that area and unwilling to travel in any great numbers to see them perform. The professional theatres' own audiences were also unwilling to take a risk on an unknown amateur company when faced with the choice of that or professional work.

The potential artistic risk posed by the talent and ability of the participants performing on the professional stage was dismissed by most interviewees, although Doc02B shows that one of the reasons for scaling down Pro-Am(B) in phase 2 was that "*an unevenness in standards*" frustrated some of the practitioners, as having so many groups meant that it was difficult to provide additional support to those who needed it.

SPTO(B) embraced the risk of the potentially pejorative connotations of the quality of amateur theatre as a way to affect change. Int08B stated they were proud to associate SPTO(B) with the amateur theatre world:

Int08B: Theatre by the people for the people. People making their own theatre. Not waiting for any funding from anyone, not waiting for any permission from anyone but taking up their own skills and making a piece of theatre for themselves.

What came through in the interviews, was the attitude that there was no restriction to artistic quality, everyone's participation was valid and valued, and the practitioners and managers in

both case studies saw it more as their responsibility to enable the participants to achieve a high quality production. This was accomplished through the delivery of an entertaining yet rigorous creative process. The participants were not drilled in theatrical skills, but simply encouraged to keep turning up, and engaging in the process and journey along with the professional creative team. The methods of achieving this are addressed in the subsequent part of the findings chapter on innovation.

5.2.1.1 The challenge of co-production and collaboration

Collaboration is a reoccurring element of Pro-Am work and a significant artistic risk. The SPTOs collaborated with external practitioners, external professional theatre companies, and in the case of Pro-Am(B), pre-existing amateur theatre companies, some with longer histories than SPTO(B). Collaboration can lead to tensions, such as clarity on whose voice is leading the project and whose vision a production must ultimately realise:

Int06Aii: That's challenging always because of course you are potentially dealing with two different cultures, two organisations, two perhaps different sets of values. You hope not because you hope that the reason they've come together is erm, because you've got shared values.

It is interesting for us having someone like [Int18A] who's a great personality, a big personality, who is incredibly passionate coming into the organisation and working in an entirely different way err and inspiring our staff in a different way, using different language, it's a different kind of energy [...] that's really good for us but I won't deny it's also very challenging and I think [Int18A] would say the same, and we check in with each other a lot, we have [...] progress reports.

This type of co-production was new territory for Pro-Am(A). A producer from the external collaborating company stated that there had been some initial challenges when the process began, mostly to do with developing an understanding with SPTO(A) about certain changes in working practice which they wished to introduce. There were also some practical details to work out, such as which people in each organisation had responsibility for certain tasks:

Int18A agreed that the co-production process can be stressful and complex, even with collaborative partners:

Int18A: I think buildings like these have production processes that allow them to be able to put on 18 excellent shows a year and then we come along and we're not that. [...]. It's a different thing they're making and so the mechanisms they had to make their life more bearable or easier or whatever don't work, and there will be moments of tension when you go, actually this doesn't work.

Because you know, there are lots of documents here. This is the document for the use of pyrotechnics indoors, and you go, great have you got one for outdoors, no, then we're gonna have to write it [...]. We're used to being really good at the things we're really good at and being really confident about learning about the things we're not. And now all of a sudden the things we were good at change [...]. And that's stressful. And also institutions are institutions [...]. But this is the most positive, the most collaborative partner we've ever had.

While there were no significant conflicts, it seems that compromise, good communication, clear designation of duties and ultimately slight shifts in the working practices of both organisations were required to find the best solutions for production 4.

Int32A advocated artistic risk as a positive part of all theatre-making, stating that mutual trust between the cast and creative team will deliver a successful end result. As such, Int32A viewed the participants no differently from professional actors:

***Int32A:** I made no excuses for them, no allowances for them, they were there to work on this show. I didn't see them any other way. It's simply a waste of my time if we behaved any other way. And it would be a waste of their time as well. They were fantastic and committed and just brilliant people to work with.*

Int32A felt that beyond the moments of the play which required a logistical health and safety risk assessment, the biggest risk was asking the participants to commit to a bold political play. Int32A believed that was a risk worth taking, because having such a large cast meant that an epic and impactful piece of work could be created. This sentiment was echoed by the production's director, who explained the artistic risk of choosing to produce a play which the participants may or may not feel they could connect to:

***Int18A:** These are big themes and to do that, I think the challenge, alongside the production challenge, the challenge is to do that with a community group, to do that with people who come from all walks of life and probably most political spectrums, to try and write a play that speaks about the world [...] erm relevantly.*

But also that all the people in the company can read it, go, yeah okay, yeah okay, I can put my name to that, that's something that's worth exploring and something worth saying.

This shows how, if managed carefully, the artistic risk of working with large casts can create striking productions which reflect the world in which the participants live, creating what several interviewees referred to as 'theatre by the people, for the people'. This resonates with the literature on community theatre (Van Erven, 2001; Kershaw, 1992). However, there are

arguably risks associated with asking such a large group of people, who signed up primarily to make theatre, to also make bold political statements.

When I stated that I was hoping to benchmark best practice within Pro-Am(B), Int08B told me that the team at SPTO(B) charged with running Pro-Am(B) was still in the process of figuring out what best practice was. Int08B said the project had created an exciting and freeing way of working, because the initiative was breaking new ground, however, there were risks to consider. For example, one of the by-products of Pro-Am(B) was that some of the amateur companies were independently hiring the professional practitioners who had worked with them on the project, to collaborate with their groups and run skills workshops. Int08B told me this was an exciting move forward in the relationship between amateurs and professionals, but was also a risk because it would need to be made clear to the amateurs that these practitioners no longer worked for SPTO(B) in this new capacity and so SPTO(B) could not be held responsible if the amateurs were dissatisfied.

Both case study organisations used in-house as well as external practitioners. As Int09X noted, bringing external creatives in to realise an organisation's vision of a Pro-Am project can have complications:

Int09X: Sometimes it works amazingly well and sometimes it doesn't. People know what we are hiring them for and we try to be very clear about the circumstances under which they are working, and the support they will get. And sometimes they need a lot of support from us as well, our artists. That is the other pastoral care element, that sometimes our artists need quite a lot of support.

This shows the risk of collaboration. An external practitioner must understand how to work with the participants, as well as having the artistic talent to create the production:

Int09X: it is just about being very clear with the artists what they can and cannot ask. For instance they cannot suddenly ask for eight extra rehearsals. You know, the same way they might be able to do with professional actors. [...] you can only push people so far who are there for non-professional reasons. [...].

I think our community actors have to be treated better than professional actors [...] they are not being paid [...]. It is the main thing that they are there. And they do commit and they have to make sacrifices as well. But it is a mutual respect [...]. I think if people don't understand that, that is very key for me. If they don't understand that it is also a privilege that these people are coming to work with them, [...] then it doesn't work.

It is vital to maintain clear communication when collaborating with external partners to create Pro-Am work, and of managing the expectations of everyone involved, the professional facilitators as well as the non-professional participants.

5.2.2 Reputational risk

Ambitious large-scale Pro-Am initiatives carry reputational risk for SPTOs. The primary risks are: the pressure to keep creating innovative work and the risk to publicly-funded organisations of not offering ambitious participation opportunities to the public; the pejorative connotations associated with amateur theatre; the potential risk to the SPTO's brand if the project is not a success; and the risk of delivering a 'fad' project, with no exit strategy or plan to provide a meaningful legacy.

5.2.2.1 The pressure to keep innovating

Int01A stated that creating an innovative programme of opportunities which grew in ambition each year, was part of the strategic rationale for Pro-Am(A):

Int01A: It's an intergenerational theatre ensemble and it was always intended that in the initial stages it would be project driven with one large-scale project a year. And the idea is each project would be new work and unique to that year, so never repeating the same format twice.

Int38X suggested there was a reputational risk to SPTOS of not creating participation activities, especially for regional theatres funded by local councils. If projects such as Pro-Am(A) are to have longevity, then there is the pressure to keep taking artistic risks and innovating new productions and opportunities to continually engage participants:

Int06Aii: the last scene is basically a big war so they're all learning stage combat [...] it is incredible, but they're also having to learn about site-specific theatre, about how to move an audience around [...]. They're out there, there'll be no hiding behind the darkness of the auditorium, they'll be face-to-face with the audience and that's a whole new scary level.

One interviewee shared the opinion that there are specific risks associated with large-scale participation initiatives which are constantly growing and developing. For example, productions involving very large casts of participants may set audience expectations which are not achievable for all organisations. This may result in organisations feeling pressured into trying to offer large-scale Pro-Am opportunities without the necessary infrastructure, resulting in low quality productions for audiences and poor experiences for participants.

Additionally, audiences may become 'wooded' by works of scale involving 'real people' and then feel that smaller productions involving only professional performers are not reflective of them and lack the interactive and relatable attributes. Several interviewees felt Pro-Am theatre could be an opportunity to increase audiences for other professional work offered by the SPTOs, but I did not come across any data to suggest it was a threat to audience levels, therefore I cannot agree with this critical view, although perhaps evidence to support it will emerge in the coming years. Another response to this perceived risk may be that if audiences develop an appetite for theatre which is 'by the people, for the people' then they could be encouraged to patronise their local amateur theatre companies, as well as seeing professional work. But it seems that it is primarily the recurring issue of scale which is the influencing factor in this theoretical risk of Pro-Am initiatives in SPTOs.

A different interviewee pointed out the risks associated with collaborating with lots of creative people, who constantly want to try new ideas. This suggests the potentially negative side of the artistic experience and aspirations of the people who populate organisations like SPTOs, which can lead to the introduction of risky and ambitious new projects which the organisation cannot successfully deliver. As Bilton (2015) points out, there are links between risk and innovation and organisations should resist the pressure to pursue novelty over value.

5.2.2.2 The risk of a 'failure' or a 'fad'

The overarching aim for Pro-Am(B) was to change attitudes and build relationships between the professional world and those already making theatre on an amateur basis. For Pro-Am(A) the main aim was to encourage as many people as possible to become involved in the theatre-making process, especially those in the local area who had never engaged with the organisation before. One of the ways SPTO(A) approached this was the introduction of a 'community press night'. This involved members of the organisation developing relationships with people in areas of the city where engagement with SPTO(A) was minimal:

Int05Aii: I went out and worked with groups in those areas, so mother and baby groups, community centres, after school clubs, homework clubs and adult education drop in centres. I went out to talk to them about [Pro-Am(A) production 3] and took a representative [...] with me, so a cast member who came and spoke about what it had felt like to be in the piece and how they were enjoying the process so far [of production 4], and invited them down.

Int05A extended an open invitation to a performance of production 4. An informal drinks reception was held before the show, followed by a question and answer session with several members of Pro-Am(A) across a range of ages. Int05A felt that encouraging people to talk to current participants would convey the experience of taking part more effectively than delivering a speech.

The community press night proved successful in introducing the organisation to people who had never been into the building before, by welcoming them, showing how involvement in Pro-Am(A) could work for them logistically, and inviting them to ask questions and engage in conversation.

Int08B elucidated the reputational risk of spearheading a sizeable and intricate project which incorporated several partner theatres and dozens of amateur theatre companies. SPTO(B) had little control over the final productions, which their name was attached to:

Int08B: These 100 shows are out there and aren't in any sense under our control. People are doing some absolutely brilliant things in the name of [SPTO(B)] and, dare I say it, possibly some terrible things with our badge [...] And actually that is the risk [SPTO(B)] is able to take as a big organisation, and I think it is good that we are doing it. We are standing side by side with them.

This shows the potential risk to an SPTO's reputation of an unsuccessful project. As Int13B stated, Pro-Am(B) took a significant risk by effectively "changing the brand". However, being such an established and renowned brand enabled SPTO(B) to absorb the risk of creating something as ambitious as Pro-Am(B). This was evidenced by two audience members I encountered during a regional showcase (Obs13B). I asked what motivated them to attend and if they knew anyone who was performing. They stated they did not know anyone involved, were in town for a night, thought the project sounded interesting and were happy to see any work on the SPTO(B) stage. This shows a trust in the SPTO(B) brand that the performance would be worth their time and be value for money. However, this level of brand power may not apply to other organisations offering similar projects. The brand of an SPTO is not always a strength when developing outreach projects. One interviewee from SPTO(B) stated that younger people sometimes tended to see SPTO(B) as a stuffy brand for older people, but adult participants were generally more positive.

Clarity of communication with all stakeholders, particularly participants and audiences was crucial in mitigating the reputational risk of Pro-Am(B):

Int08Bi: What we have got on it this time [the marketing material for Pro-Am(B) phase 2] is it says [...] “[SPTO(B), Pro-Am(B)], celebrating amateur theatre”. So what we hope is that brand on there says we are supportive of what these guys are trying to do. Rather than says, this is made by [SPTO(B)].

So I am sure there will be a little bit of confusion between the two. And every now and again a poster comes in from one of the groups and [...] funnily enough celebrating amateur theatre has just dropped off. [...] So I think there is a little bit of risk around that.

Int24B echoed the importance of being clear to audiences that Pro-Am(B) productions were not SPTO(B)-produced work, but autonomous amateur groups which audiences were watching. This also shows the complexities of marketing risk-taking initiatives:

Int24B: that wouldn't be fair, well fair on anybody. So again thinking carefully about how we were using branding, how we were talking about the event. So we produced that logo, that does say [SPTO(B)] on it, that does mean that the amateur theatre-makers have got the [SPTO(B)] logo on their work, which again was really important to us, but it's clear that it's, it's a project, and it's linked to amateur work.

Int24B also stated the reputational risk to the organisation of the public perception of the project, which was mitigated with lots of communication with the public and the media.

The facilitators of Pro-Am(B) endeavoured to recognise the limitations of what they could offer. Int08B explained how the reputation of SPTO(B) could be damaged if they seemed to be dictating to the amateurs how to make theatre ‘properly’ and do what they had already been doing for years. SPTO(B) staff negotiated this territory with care. This evokes another side to the reputational risk of collaborating with amateurs, which was the way the amateurs viewed the project. There was some scepticism initially from some in the amateur sector that SPTO(B) were not serious about engaging in a meaningful way and only wanted to try to ‘improve’ them. This proved unfounded when the project got under way, and the extent of SPTO(B)’s commitment to the project became clear:

Int34B: I think it is just tremendous for all those groups, all those societies that have taken part in it. So from our point of view, having got over that initial question there has been nothing but positives in the relationship.

SPTO(B) resisted giving the participants comments on the productions they created during phase 1 of the project. But the request from the participants to be given feedback by the Pro-

Am(B) practitioners and mentors was so overwhelming, that it was introduced for phase 2. As previously stated, SPTO(B) also tried to avoid any competitive connotations. Therefore, the strategy for phase 2 was to ask each group to vote for another group from their regional showcase to go forward to the national showcase on the SPTO(B) main stage:

Int21B: they asked me what they were voting on and to me it was what piece captivated [Pro-Am(B)] So it wasn't necessarily the best performance, but it was which of the groups have grown the most, which of the groups have really taken a massive challenge and big risk as well, because a couple of them had written their own pieces.

This was a divisive element of the project. Int08B stated some amateurs actively sought a competitive element, whereas others were resistant, feeling this went against the collaborative nature of the project, and they did not want to have their hobby, which they were very passionate about, judged. Int08B highlighted the difficulty of a satisfactory end to the project which seemed fair and inclusive for all participants:

Int08Bii: But you were still thinking it's a shame we couldn't bring together all the 100 companies. And somehow do something with them. So it's not entirely err, I think it's a slightly flawed way of culminating it.

Int08B gave their reflection on the fractious relationship between amateur and professional theatre-makers, which had previously only existed through amateurs hiring spaces in professional theatre buildings. This made SPTO(B) cautious about how amateurs would view the intentions of Pro-Am(B). Creating the network of partner theatres was central to addressing this risk:

Int08Bi: it's a recipe for a car crash of status between the two of them, because they both think they are in the high status position. One's handing over money and expects a service the other one is going, we are the professionals you are the amateurs do what we say and listen to us.

[...] and the answer is neither of those things is quite true, so taking out that relationship and making it a partner relationship was better. And that's why we would never have wanted in this scenario to have the amateur groups paying to be part of [Pro-Am(B)]. Not because of anything about access, though that would have been a concern eventually, about who can access it, but mainly they would have seen us as service providers and that would have in many ways deafened them to any other relationship with us.

This shows once again how the positioning of Pro-Am(B) was so important, that it was clearly about collaboration and the offer of skills development. The facilitators of Pro-Am(B) said

they did not experience much in the way of resistance to the project, although there were amateur groups who were not enticed by the offer of skills-based workshops. However, as the reputation of Pro-Am(B) grew, companies began to discover different types of value in the project, such as the opportunity to develop or improve relationships with their local professional theatre, and other amateur companies.

Int08B also felt that positioning the project as a way to celebrate similarities and learn about each other's differences showed a long-term commitment to a renewed relationship between the two sectors:

Int08Bi: we turn over staff really quickly and [professional] theatres live very fast and die young. And amateur theatres live on a different timescale and that is one of the really interesting things. [...] And so you have got to have that longevity and long term commitment. [...]

we have changed the culture so much there is no way out of that. And certainly that was our raison d'être to going back to [charitable trust] and saying, can we have some more money to continue this? Because [...] we have made an impact [...] But we need to consolidate that impact.

Another potential reputational risk to SPTOs is being seen to be populating their stages with the 'free creative labour' of volunteer amateur participants. There was conjecture amongst the interviewees about this. There was a consensus that these projects were about creating participation opportunities and there was no displacement. In fact, they arguably created jobs for the contracted professional facilitators and small numbers of professional performers involved. Both organisations were in regular contact with Equity, the industry union throughout the development of the projects. However, given that Equity has reacted disapprovingly to some other Pro-Am projects, coupled with the ways these projects were innovating working practices, there is likely to be continued debate ahead.

Interviewees in both case studies suggested that there was occasionally an internal challenge in encouraging colleagues to engage with Pro-Am projects if, for example, staff members had pejorative perceptions about the quality of amateur performers compared to the professional output of the organisation:

Int24B: right at the beginning we talked about the fact that we were actively wanting, actively inviting amateur theatre-makers to perform on our stages. So I suppose there were perception risks here about why we should do that [...] So there was internal communication that we needed to do, and kind of internal advocacy

about the project, which we've done successfully but which you need to keep doing otherwise [...] that kind of feeling can creep back again. So I suppose in the risk management you need to maintain that.

Int06A who had conceived the Pro-Am(A) project, had received a roundly positive response to the concept from the board and rest of the organisation:

Int06Aii: not one struggle. Everyone just felt it was a worthwhile idea and everyone got excited about the 'intergenerationality' of it. And that continues.

This sentiment was cemented by the testimony of the chief executive. However there had been a period of adjustment in terms of embedding Pro-Am(A) within the organisation:

Int14A: I don't think the organisation was embracing it as much as it should be and I include myself in that. It was partly to do with deadlines [...] part of the organisation doesn't get geared up to it until it's a bit nearer the time, because they're doing other stuff. [...] I just said I want us to lift this up from where it is now. [...] these people are giving up three months of their lives and working here every evening. And I think there's a whole thing about their journey, about who they are that we don't [...] I don't know. I mean [Int05A] does and [Int06A], but I don't know that and I said, we owe it to them.

The decision was then made to give each participant a two-line biography in the show programme for production 4 (Doc12A). These biographies included where the participant was from, their occupation and one 'fascinating fact' about them. This, along with group photographs with list of names underneath, highlighted the individual value and contribution of each person.

Int13B also stated the principal risk associated with Pro-Am(B) lay in not designating the time and resources needed to develop it successfully. This was mitigated by appointing Int08B as a full-time project leader, with careful planning and by ensuring that all departments of the organisation could find the time in their day to devote the same effort to the project as they did to their other work. Once the strategy was in place, Int13B felt there were only benefits to the organisation.

Int08B echoed the testimony of several interviewees by highlighting the reputational risk to the organisation of not having a strategy for the project's sustained legacy:

Int08Bi: I think the biggest risk is at the end of this [...] is for it to have been a bit of a fad and for it to have been a bit of a fashion for us [...] It's set a real benchmark. How you work with a number of theatres and a number of sort of constituent groups.

But it doesn't mean you just have to keep doing [Pro-Am(B)] but I think if you then went, after 2016, you know it is probably out of fashion or something a little bit now [...] And I think that would do more harm than never having done the project in the first place because one of the things we know about amateurs is that they have incredibly long memories.

SPTO(B) did not want to be seen as arbiters, connecting with the amateur companies and partner theatres only fleetingly. But at the same time, they recognised that their level of brand recognition and position as a flagship organisation could affect change.

Int07A and Int16A highlighted the potential reputational risk of ticket prices for SPTO(A) productions correlating with the cost of seeing some of SPTO(A)'s professional shows:

Int07A: most of the theatres don't charge for their community shows and I think that's really interesting because, again [SPTO(A)] it's saying, well this show is going to be just as good as the professional shows we put on and is going to be just as worth your £10-15 [...] and I think that's a really bold position to take. [...] it is a risk but I think it's important though because then it's really clear from the beginning that this project is going to be treated like a professional show [...] and the bar is set very high and we're all singing from the same hymn sheet.

Tickets for Pro-Am(A) productions had a similar price point to the professional shows in SPTO(A)'s smaller space. Pricing Pro-Am productions is a strategic challenge. On one hand there is the argument that SPTOs should not charge the public to see performers who are appearing for free, although both case study SPTOs subsidised the projects and did not profit from them. On the other hand, charging audiences signifies quality and a commitment to production values which have parity with the professional work.

One interviewee suggested that opening the doors to large numbers of participants could carry a reputational risk for organisations which are publicly-funded and therefore publicly-accountable.

Int11X: If you open up and allow people to do things or create things in your space or work with you in your space, what do you do when they do something that the institution can't necessarily handle? Or more precisely when they do something that stretches the bounds of what the institution can allow?

Int11X suggested that SPTOs need carefully crafted governance which protects the reputation of the organisation whilst also encouraging the Pro-Am work to be as artistically bold and expressive as possible.

5.2.3 Financial risk

It is common in SPTOs for a portion of the central funding from ACE to be ring-fenced for outreach work and the rest accumulated through fundraising. Pro-Am(A) and Pro-Am(B) were supported by the same charitable trust (CTF) and both were additionally subsidised by the SPTOs. In order to receive and maintain the funding awards, both SPTOs had to fulfil stipulations from the CTF and propose the benefits of the project for participants and the organisations:

Int04A: part of that funding is to continue our productions at the standard that we have been at and then part of that as well is the engagement side. And those areas of engagement link to our organisation as well and where our audiences are coming from and where we want to engage more with. So that's linked across [SPTO(A)'s] business plan.

Int08Bi: part of what we sold this to [name of CTF] on, was we want people to discover different models of being able to make this work. Rather than prescribe one [...] the different theatres found it easier to do it different ways.

One Pro-Am facilitator told me that “selfishly” for them, the benefit of CTF funding was the stipulations, because this meant the allotted funds had to go into delivering the stated objectives and therefore money could not be diverted away from a project. There is a level of flexibility with central funding from ACE, as long as objectives are being met, projects and productions can change and evolve. However with funding from a CTF, which has been designated for a specific project, there is an expectation that the project and its objectives will be delivered as closely as possible to what was proposed in the application.

Applying for CTF funding is a lengthy process. An initial document presents an outline of the project and its potential life span, which gets approved or denied. Applicants are then encouraged to make a comprehensive second stage application, detailing the budget and objectives. There is then a phase of interviews. A yearly review plus a final report on delivery of the project are expected.

Int28A: You have to prove that there is an actual need for this project to be given a life, right the way through to your exit strategy.

SPTO(A) were concerned about maintaining their commitment to the project when the funding period ended:

Int28A: each year [...] productions have become bigger and bigger, so one way of course is box office income. [...] So once that [amount awarded] a year has gone we have to find another way of meeting that. [...] At the moment we are thinking about what that means.

This shows the financial risk of a CTF award helping to build a project, which the organisation is then committed to continuing due to demand from participants.

Int28A felt that the CTF had been compelled to support Pro-Am(A) because of its scale, its dedication to artistic risk-taking and artistic quality, and its collaborative approach to theatre-making:

Int28A: it's not safe [...] you know we have never done anything outside before. And that's what we took outside. [...] every production that we create with [Pro-Am(A)] we don't do it for them, we do it with them, and we do it to the same standard as any other of our shows.

Int28A also spoke about the importance of a constant dialogue with the learning department, which “keeps the story alive” for the funders, and of focussing on the full programme of opportunities, not just the epic productions:

Int28A: the workshop programme is integral to [Pro-Am(A)] because it's from the workshops that we engage new people, who then will be more inclined to come to auditions to then be, you know, cast in shows on stage. So the workshops are a real sort of key touch point if you like for engaging new people in the city.

There are risks associated with any form of funding and an organisation has to make considered strategic decisions when applying for any funding source:

Int28A: we haven't gone down the sort of sponsor route for [Pro-Am(A)]. Because for us the focus is absolutely on the participants and, you know, enabling the activity to happen with and for the participants, rather than delivering something for a big corporate sponsor.

[...] if we did talk to a business about them sponsoring it, we would have to think very carefully about what we were willing to sort of give to them in return if you like. Because that's really the way the sponsorship world works.

Int28A advocated the importance of a clear ethical policy which, as registered charities, SPTOs like theirs should have in place. This helps to ensure that the acceptance or pursuit of any financial support is aligned with the organisation's mission and values.

Int08B explained why CTF funding was the right fit for Pro-Am(B):

Int08Bi: we were talking about something slightly different to the traditional model of community participation; removing barriers to participation and the social inclusion aspect. [Pro-Am(B)] is sort of something else. This is working with autonomous pre-existing groups of people who are passionate about theatre. So in some ways is that harder to get support? [...] And I think [name of CTF] took a real leap of imagination.

The CTF award money for Pro-Am(B) did not go directly to the amateur companies, but was used for the skills development:

Int08Bi: the idea is [...] that they will then take these skills, and yes, they will use them as part of the project, but more importantly they will become sort of virally part of the culture of amateur theatre and I think our dream [...] and the practitioners involved get really interested in it and excited by [Pro-Am(B)] because it is such a fresh area.

Both SPTOs spoke very positively about their relationship with the CTF. Int16A stated that though some objectives were not fully met, other unexpected opportunities and achievements emerged from the innovative process. Int08B echoed this, saying that the CTF was interested in what did not work, as well as what did, because they recognised that this was where the opportunities for learning and shaping best practice lay:

Int08Bi: They are very supportive partners, and it's the moment you open up, that that's where the project is, that's where the learning goes on, in the bits where you go, well if we did it next time, would we do that?

This highlights the importance of 'learning' to both projects. This was central to the overall mission of the CTF which supported them, which funds "the charitable work of organisations with the ideas and ability to achieve positive change" (Doc10B). This is a broad objective and was addressed in several ways by the SPTOs, including the internal changes to their organisations which were informed by the lessons learnt from the projects' challenges.

Int16A stated that at SPTO(A) the approach to budgeting Pro-Am(A) shows aligned with the rest of the organisation's artistic output. This shows commitment to the concept:

Int16A: [Pro-Am(A)] productions are part of the production budget and not a part of the learning budget, so they're being treated exactly as [name of a professional show]. It all gets budgeted as part of all productions [...] it's important that it has to live in that erm in that season. So if a [Pro-Am(A)] show is expensive, this can be balanced over the course of a season with revenue from other shows.

It was a common finding in both case studies that the organisations recognised the risk of ostracising and excluding some participants by charging them, and thereby changing the

initiatives' tone and vision. So it was an important part of the strategy for both projects that participation was free. One participant felt that SPTO(B) perhaps did not realise the financial implications of taking part, for both individuals and amateur companies. This participant had travelled to the locality of SPTO(B) fifteen times including two weekends over the course of the project. Additionally their company spent several hundred pounds on travel for the showcase. Therefore, even if the Pro-Am projects are free to take part, facilitators should be aware of the potential costs for participants.

5.2.3.1 High production values and short runs

Int01A stated that the organisation was working with a professional set designer on Pro-Am(A) production 2 and showed me the design drawings and model for the ambitious set. This was evidence of the high production values given to SPTO productions, and the financial commitment this constitutes. Setting a budget for a production is a general financial risk in terms of theatre programming, which creates a compound risk for Pro-Am projects. In the case of the Pro-Am(A) model, not only were high production values applied and large casts accommodated, but runs were short, which allowed precious little time to recuperate costs through the box office. All the Pro-Am(A) productions I saw had sold out, which suggests runs could be extended beyond the usual four to seven days. However, the limitations for how long a run can last are different for professionals and amateurs, because amateurs have other commitments and cannot be expected to sustain a run of three or four weeks:

Int04A: We have got a cast of 100 and it is about programming so we thought that that production would be better in there because of the space. So again you know it is kind of bold, artistically in that we are going to say, yes, we are going to fill 6 performances of a [Pro-Am(A)] production with [around 900] seats a night.

If audiences do not respond to amateurs on the professional stage then this carries financial risk. One interviewee suggested there may also be a potential risk if they do, because there could be risks to organisations if audiences are inflated for Pro-Am work because the auditoria are filled with friends and families of participants, but those people do not return for other productions. This could lead to box office volatility which could impact on an organisation's resilience. Additionally, organisations should not rely on participants to fill the space and strive to develop new audiences for Pro-Am work:

Int16A: it's a big space to fill, four, I think it was maybe five nights and erm there is a tendency with [Pro-Am(A)] work that we do, there's a tendency for people to

say, well it will be fine, it will be full because all of their family and friends will come. But the idea is not supposed to be that it's just family and friends who are coming.

I was interested as to why SPTO(A) had started holding press nights for Pro-Am(A) productions 3 and 4. Given that the runs were so short, I wondered if they were able to capitalise on the publicity. Int06A told me this had little impact on ticket sales, which was not the objective:

Int06Aii: for us it's not about audiences, it's about the discussion, it's about having that work analysed in a similar vein with, alongside other professional work [...] Obviously if fantastic quotes come our way and sometimes there are, then they're brilliant anecdotal evidence for us to shout about that work, which doesn't always get attention in the same way that say revivals with stars gets attention. So it does help [...], not necessarily to sell tickets, but to celebrate the work that we do which we think has intrinsic value.

The way the organisation moved the work forward from any discussion inspired by the press reaction was to think about future practice, so listening to what people liked and did not like, deciding if they agreed with the criticisms and if so how future practice could be improved.

5.2.4 Operational risk

This section explores the logistical challenges of large-scale participation initiatives in SPTOs. The scale of the projects create a variety of operational risks. One of the primary operational risks to Pro-Am(B) was maintaining a line of communication with all parties:

Int24B: we'd got all those 260 odd amateur theatre groups, we'd got the partner theatre venues, and then in year 1 of the project we also had a collaboration with drama schools. So maintaining the communication with all those people was one of the risks that we identified early on.

And we don't have the capacity and we don't want to, to have a massive kind of admin infrastructure behind the project, so it was finding ways to do that, in the most effective way and to make sure that we weren't forgetting people.

The partner theatre structure helped address this challenge, as each one managed relationships with a group of amateur companies. However, this system did not always run smoothly, as not every partner theatre could dedicate the same resources:

Int24B: where it starts to not work so well is when, for whatever reason, a partner theatre can't do that. So say they have a change in personnel or they have a particularly busy period. So it's kind of knowing when those risk points are going to come and knowing we've got a system in place to manage that.

Establishing a flow of communication was also difficult given that most amateur companies met in the evenings, when SPTO(B) staff were not at their desks. Effective communication was identified by Int24B as the principal risk to the project's success:

Int24B: if we're not doing that [communicating] well, as well as obviously delivering a good product, which in some ways I trust more, I know that we can do that, but how can one person communicate with all these different groups, is more challenging really and it's easier to make mistakes.

SPTO(B) were challenged at times by the structure of Pro-Am(B), with the amateurs promised at least twelve two hour sessions, facilitated by the partner theatres. In some cases, freelance practitioners were brought in to run the skills exchange workshops and mentor the participants, with a different contact at the partner theatre being responsible for managing the relationships with the amateurs. Int08B felt this was challenging at times:

Int08Bii: those freelancers were vulnerable to feeling just [...] you know going out and working with all these amateur companies, not [SPTO(B)] and not really [name of partner theatre] and I think [name of project co-ordinator from a partner theatre] did it brilliantly and managed to square that circle [...] a few of them worked really well.

As previously stated, the amateur theatre organisation run by Int17B was a partner theatre in Pro-Am(B) as well as a participating company. Int08B noted that despite all their resources, that organisation did not have an in-house professional practitioner for the project. So in phase 2, SPTO(B) gave this partner theatre more input and a designated SPTO(B) practitioner (Int21B):

Int08Bii: it worked really well and I think one of the things we'd consider next time is whether we do that with all our partners, cos it worked so brilliantly [...] Just little simple things like [Int21B] did a monthly newsletter and I think that made an enormous difference to all those groups and I wish we had thought of doing that for the whole company [...] [Int21B] went out loads of times to those companies and worked with them and got to know them. They felt a real ownership of [Int21B].

A significant challenge for managing Pro-Am initiatives is negotiating the balance between resource management and demand uncertainty. Both Pro-Am(A) and Pro-Am(B) were reliant on the participants committing to the projects.

Pro-Am(B) was involved an extensive network of hundreds of individuals: "actually the professional world looks small by comparison" (Int08B). Therefore, if participants stopped

attending skills exchange workshops, or did not pass on what they had learnt to their groups, then one of the central tenets of the project, to share skills, was not fully realised. Int29B stated this happened to their amateur company in phase 1 of the project, which made their members somewhat anxious about applying to take part in phase 2:

Int29B: So everybody was a bit a bit err, sceptical to say the least about doing it again, but this time I felt [...] I was able to cascade a lot of skills. I learnt about other parts of the theatre which I hadn't really touched before, and I made a point of trying to pass on that training and then when everybody finally went to [SPTO(B)'s main theatre] that was the icing on the cake [...]

Int29B was impressed with the increased level of support from SPTO(B), and felt the project was more focussed and successful in phase 2. However, not everyone agreed. Int30B and Int31B were also involved in both phases and felt the reduced number of groups in phase 2 had pros and cons:

Int30B: the workshops were without exception, great and worth doing, [...] the decision to reduce the number of companies in the second tranche, [...] not sure whether it was a help or a hindrance to be honest. The number of participants at each workshop were fewer, which was good in that people got more of a bite of the cherry, and some of the companies were different from the first round, which was sort of good in that more people got to participate in the project, but personally I don't think the second groupings worked as well as the first.

Int31B: I agree with [Int30B] about the loss of groups in second round. People had lots of fun and seemed to get more out of it in the first round. Whereas the second, was an element of, we've been chosen, we're special, and you're back into the elitism of it again, which is what to my mind the whole thing was trying to get away from.

It was not only the scale of the project which was a challenge. The scale of the individual productions in Pro-Am(B) presented operational risks for the amateur companies. Another Pro-Am(B) participant remarked that whilst their company valued their involvement in the project, they would be reticent about undertaking another large production.

Int37B: Personally I enjoy large ensembles but rehearsals are so hard with amateurs – they have jobs, families other commitments, and we never had a full cast until two weeks before even though we had a tight rehearsal schedule [...] In the end, as with all shows, people do pull together and it was a great success but it was a very big spectacular and I think I have learned that perhaps this type of production can only happen once in a while for a small community company and it was great it was as part of [Pro-Am(B)].

The scale of the undertaking was also a central concern for the facilitators of Pro-Am(A). One staff member (Int23A) was particularly concerned that their other duties in the organisation meant that they could only dedicate a limited amount of time to the project. However, this was alleviated for production 4, by the continued presence of the theatre company who was co-producing the production:

Int23A: I suppose it's the amount of people. It's hard to quantify, you know there are some people who I've probably had very little interaction with, but I suppose for the project's sake it's the consistency of people's experience [...]

So I guess one of the risks is that you are stretched very thinly and so you don't always feel you're giving everything. It's not like I'm working on that project solely, it might take up a vast amount of my time. [...] That's why working with [name of external collaborating company] in this way was productive [...] because they were here and they were dedicated to it.

Int23A explained that the organisation had tried to mitigate this risk of people dropping out or not enjoying the project by SPTO(A) staff being a visible presence as often as possible, in addition to the co-production team who were directing production 4, so that participants knew they were supported by the staff and could approach them with any concerns.

5.2.4.1 Balancing the artistic with the logistic

Administration and logistics require as much attention as the creative side of large-scale Pro-Am projects. Addressing the balance between the artistic vision and the logistic concerns recurred in both case studies. For example, for Pro-Am(A) productions 1, 2 and 3, the cast were broken down into smaller groups to make rehearsals more manageable, with the whole ensemble brought together in the very final stages of rehearsals. This meant that the plays were made up of composite scenes involving parts of the cast, and the whole ensemble only appeared on stage together occasionally. For production 4 however, the creative team proposed a different model:

Int19A: this cast had to be in a lot [...] most of them were in nearly every night and every weekend, the whole rehearsal process. [...] we said to them, we can do this one of two ways, we can either divide you into casts where you only do act one and you only do act two. And you only do act three. Or we can all be in all of it. And we think it's a more rewarding experience where everybody owns more of the show if you are all in all of it. But you have to come to a lot of rehearsals. So they were all like, yeah we are up for it.

This approach aimed to galvanise the participants as a “gang” with the collective purpose of supporting each other through the process of creating the production. However, it required a significant logistical effort and meticulous planning. The company took their usual, innovative approach of employing props, costumes, microphones and other elements from day one of rehearsals “because in a way that changes everything” (Int19A), rather than introducing these elements as the performance approached. Int18A drew up a detailed schedule two months before the first rehearsal. Every half-hour was accounted for, covering not just rehearsals, but other details such as equipment testing:

Int19A: what is interesting is there is always a bit, about a week before we open, where everybody starts to lose their mind a little bit and starts to doubt the schedule and [Int18A] always says, we had had more sleep, we were cleverer when we made the schedule. You have to just stick to it, and we always do and that always works. [...] But structurally it's good to have all of that in place, because it's such a huge machine.

I would argue that this level of assured strategic planning suggests that not every organisation can easily offer this type of participatory work. The length of time needed to plan each production was corroborated by Int10X:

Int10X: I think to really make it work you have got to put in a lot of relationship building and making sure that the people you are working with are the right people [...] It is quite time consuming [...] Yes so ideally every eighteen months would be my preference.

The decision to make Pro-Am(A) production 4 a promenade piece, which started on the SPTO(A) main stage then moved the audience out into the surrounding streets, was made for two reasons. Not only would it challenge the participants by presenting them with new skills and techniques, it would also create an exciting experience for audiences. This could potentially encourage people from the local community to engage with the building by offering an alternative to the traditional play in an auditorium, which could be intimidating to someone who had never been to the theatre before. However, this production obviously presented complex logistical challenges. Int23A explained the importance of assessing the audience route and how the public might interact with the show. For each show the company created an “event document manual” with a methods statement, extensive risk assessment, information for the local council, police, businesses and any other concerned parties. The

company also spent a considerable amount of time “just talking to people” and building relationships with local businesses and residents:

Int20A: so they know we're around and can talk to us, ask any questions and concerns. It makes life much easier if you do this as early as possible. It's about making sure that the piece is owned, not just by the theatre and participants but also the wider community and the city.

Several interviewees felt that balancing ‘the artistic with the logistic’ was an integral part of theatre-making, but that with large-scale Pro-Am work, significant attention to detail was required:

Int19A: the play makes certain decisions for you. So I suppose there are artistic decisions which [...] feed into the structure. So I don't think one comes before the other or one is more important, but I do think in this particular show the logistics of it are more important than in other shows.

The writer of production 4 explained their approach to logistics when writing a piece for a cast of over 100:

Int32A: Anything you make, whether it's theatre, film, television, is a practical art form, so the logistic and the artistic are fundamentally linked. [...] all of these things are woven into the concept of how you make something, so there was no disconnect with those things. [...] The spine of it is no different to any other play [...] the resource of having [Pro-Am(A)] allows us to tell that story on a kind of massive scale, which is wonderful.

This was supported by Int18A who explained the challenges but importance of applying professional production values to such a large production. For example:

Int18A: and they all need to be dressed because actually [...] they can't all wear their clothes, they can't all just turn up in whatever they came to work in, they've got to wear costumes and those costumes have to be organised which now means we need to be able to place a chair with a hanger behind it and boots in front of it for every member of the company. The building wasn't built for that [...], it's a real challenge.

A challenge posed by Pro-Am(B) was that the professional practitioners and mentors sometimes found it difficult to adapt their working practices to the timing mechanisms of the amateur theatre model. Int21B called this “our time clash”, stating the amateurs were used to doing a full day’s work then going into rehearsals, but Int21B often found it demanding to work all day on a different project, then run a Pro-Am(B) workshop in the evening. Int21B had gained an increased understanding and appreciation of the logistics of amateur theatre:

Int21B: *it's a miracle they get anything done at all sometimes because you know they will rehearse with one person this week, and somebody else the week after, sometimes literally not until the first night do they have the entire cast in the same place. And some of them rehearse in bizarre places and you know you see them working, you see particularly these guys who have been involved in [Pro-Am(B)]. Even that's been nothing short of a miracle. [...] I think they would say yes to everything and then they have got to try and coordinate [...] people to be in the right place at the right time.*

The scale and timetabling of the project was an operational risk also highlighted by Int08B:

Int08Bii: *it's a very big project to run. But actually with [SPTO(B)] it's quite a small resource, there's me and a couple of other people working on this and other things, and it's over a sustained period of time.*

[...] And they will do their show, they are on small cycles, so we are on this overarching sort of cycle of doing the project [...] so actually they are all on little arcs of their own shows, and sort of realising that and handling and keeping that within the project is, it's quite a challenge.

As previously stated, there was a reliance on the network of partner theatres to manage contact with the amateur companies. This was an operational risk because some were able to designate more resources to the project than others and had different ways of delivering outreach projects. However, finding new ways of connecting the amateur and professional sectors was a main objective of Pro-Am(B) and so this operational risk was integral to the project:

Int08Bii: *You rely a lot on the partner theatres I think, and some of the partner theatres are into this more than others. And again some of that isn't just whether they are good or not at doing this, some of them are, some of them they have got different models of how they work. And we wanted them if you like to find different models of doing this. To find what the best ways are of doing it.*

This was confirmed by a representative from an amateur theatre sector body, who said that learning about the differences in working practices between the amateur and professional theatre-makers was a positive aspect of the project for both parties, but was also a challenge for the project overall. For example, as stated by Int21B, the amateurs were not used to short and intense rehearsal periods, given that their jobs and other commitments prevent them from rehearsing on a full-time basis, *“and you can't populate Pro-Am productions with people who are retired, you need young blood”* (Int35B).

Int35B reflected on the wider point that what differentiated amateurs from professionals was not a lack of talent or knowledge of stage craft, but more often than not, logistics. Int35B felt

that “*the play’s the play*” and needs a similar stage management structure and other elements in place, whether a professional or amateur production, “*it’s just that the professionals have more money to throw at it, it becomes that simple.*” (Int35B).

5.2.4.2 Pastoral care

The data suggests that pastoral care starts from a baseline of health and safety and then incorporates any issues or concerns that participants, and occasionally the professional practitioners, may have with the creative process or their involvement in the project.

Recognising the need for pastoral care in participation initiatives, and putting a structure in place is important, given the often rigorous process and emotional power of theatre-making (Mshengu-Kavanagh, 1997). This was less evident in Pro-Am(B), but even though the participants were mostly experienced amateur theatre-makers, it may have been advisable to devise a system and make it clear that there was a contact person for anyone who needed support in the process. I recognise however that there were hundreds of participants involved, and that each amateur company did have an assigned mentor from the partner theatres.

In the case of Pro-Am(A), pastoral care was a recurring and complex subject. For example, the Pro-Am facilitators from SPTO(A) took official responsibility for pastoral care, clearly stating to participants which staff members to approach with any concerns. However, this was a slight point of tension in production 4, as the members of the co-production company were also acutely aware of the importance of making everyone feel valued and supported. Int18A strongly believed that as the production’s director, they should not focus solely on what happened on stage, but also take responsibility for pastoral care:

Int18A: Here, there is a brilliant team run by Int04A who are really hands on in the pastoral care. That’s actually, that’s a problem for me because we’re used to being the people who take care. Part of the artistic process, is that - to care about the pastoral care. It’s not something you do instead, it’s not something we do because we’re good people, it’s something we do because why on earth would you not do that? They’re my team.

[...]And there is a pastoral team here and they’re brilliant, they’re amazing. But they consider that that’s their job and I go, no, it’s my job.

Int18A stated that with each production the company was learning how to improve its pastoral care, and felt SPTO(A) had the same approach, a comment echoed by Int04A and Int05A:

Int18A: And I think the pastoral care of the company is better, because we're learning with each [production] we do about what they want and where we should put money, and where we should put time. And I think, so are [SPTO(A)]. There are things they've done differently from [production 3], which I think are a greater investment. [...] I think they've realised that this is a bigger undertaking, [...] this is one of the futures of the building.

Pro-Am(A) introduced a policy of 'Company Contracts' for each production (Doc14A) which was in line with those given to professional actors working in the building, and stipulated policies on issues such as health and safety, child protection, attendance, and use of social media.

Int04A: they are signing up to commit to the project/the production and we are signing up to ensure their safety and welfare as part of the process.

It was found that setting out guidelines detailing what the cast and organisation could expect of each other was valuable in preparing for problems before they arose:

5.2.5 Perceived risk of participants

The data suggested that the opportunity cost for participants in Pro-Am projects translated into a composite of three types of risk: investment of time, emotional investment and the risk associated with public performance.

5.2.5.1 Time investment

As has already been established, the case study Pro-Am initiatives required a substantial time commitment from the participants. The perceived risk was therefore that the participants could feel their time had been wasted or not valued by the SPTOs. The entire projects were obviously at risk if people dropped out.

As one Pro-Am(B) participant noted, the organisers were initially surprised by the amount of time the amateur theatre-makers dedicated to their participation:

Int29B: we are giving our time freely, some people give a great deal of time freely, because of the richness of the creative process. I mean that's the reward that we get.

It was therefore deemed of great importance to the Pro-Am(B) participants that SPTO(B) recognised the dedication and commitment they were already giving to the art form, before Pro-Am(B) began. Int29B valued their own participation in the project, particularly the workshops on skills like editing texts. However, Int29B was dubious about repeating the process by applying for phase 2, as phase 1 had been a two year commitment. This highlights an inconsistency within the project, because on one hand, SPTO(B) were keen to embed the project in their own organisation, and show they were serious about building sustained relationships with amateur companies. But on the other hand, some participants were slightly put off by the expected length of their engagement.

The practitioners involved with Pro-Am(A) production 4 viewed the time given to the project by participants as enormously valuable, with one stating that if that time were viewed in monetary terms, it would add to up to a substantial amount:

Int18A: these people are philanthropists. These people are the bedrock of how our theatres will behave in the next thirty years because they give the most precious thing, not money, but time.

One Pro-Am(A) participant told me that while their involvement in productions 3 and 4 was at times “*exhausting*”, and fitting it around their work and life was a real challenge, their commitment was a testament to the creative team. Another felt that the investment of their time was significantly rewarded with ‘money-can’t-buy’ learning experiences:

Int27A: it’s the amount of stuff that you’re getting for free, not free, you’re giving your time and helping the theatre to be full, but you get fight coaching and you’re being taught to sing by somebody who’s musical director of stuff that’s won awards. So you’re talking about quality stuff, everything. They’re all skills you could go and buy, you could go on a singing course or a fight coaching course but there’s also how it [the theatre-making process] works, which I find amazing.

However, similarly to Int29B, but on a different scale, one Pro-Am(A) participant was dubious about taking part in future Pro-Am(A) productions. Like Int29B, this person valued the skills workshop immensely, but was not sure they wanted to “*give up a whole summer*” to be part of another full-scale production. This person also felt that their participation could be valued even more greatly by SPTO(A), because, “*we’re doing them a favour*” by committing to the project and by encouraging their friends and families to buy tickets for the shows. This person suggested that SPTO(A) could make participants feel even more valued by making them more aware that they were part of the on-going history of the organisation, and not just “*part of a*

project". The testimonies of Int04A, Int06A, Int14A, Int16A and Int28A shows that SPTO(A) was committed to doing this, by including Pro-Am(A) in the organisation's future plans.

A common finding amongst Pro-Am(A) facilitators and practitioners was the importance of learning each participant's name:

Int19A: yes it takes effort, but to know everybody's names and their surnames, it's the goodwill that we have really invested in getting to know them personally. They feel that [...] if I'm not there they know my name and I will be missing and that's really important. [...] it also makes them feel that they are being taken seriously.

Int19A went on to state however, that there was a mutual expectation of commitment between the cast and creative team:

Int19A: I think that's the other flip side of all those things, [...] learning everybody's names, being nice, looking after them, but also you don't want to be too like you are mothering them because they are non-professionals. They are a community company, but you can't make provision for that. We are doing something difficult [...].

We also said we will make a promise to you that if you turn up and work hard we will value that time/money you have given us and hold it with the value that it's worth, as long as you value it in the same way. So that when you come we will make sure that we won't waste your time, won't leave you sitting around we will make sure that you are watered and fed and properly trained and properly rehearsed and feel proud, but at the same time we expect that when you turn up you value yourselves in the same way.

Trust within the artistic process was not only critical, but reciprocal. The participants put a great deal of trust in the professional facilitators that they would be guided through the process and create a piece of high quality theatre at the end which will have been worth the investment of their time and commitment. The facilitators had to trust that the qualities they would expect from professional performers would be shown by the participants; that they would turn up voluntarily, learn their lines and be prepared.

I was struck by the concept of the SPTOs *hosting* the participants. Food and drink were mentioned several times, as well as references to physical comfort and not keeping people waiting around:

Int09X: It is extraordinary you know that they have given up time and that they thought that they would enjoy it, yes I find it amazing. So we often have to be there making fools of ourselves and showing everyone that it is okay and making them feel welcome. That's [...] I think that is a big part of our role. Welcoming,

welcoming, welcoming [...] everything that I do involves food, absolutely everything.

These relatively simple actions, although financially costly at times, seemed to buy large amounts of goodwill and show the participants that their commitment was valued:

Int19A: we organised to have a full curry meal for the whole company and [...] and we all sat together and we hung out [...] then it got really hot and [Int18A] just said, look let's just get a water bottle for everyone, and at the end of the day it does cost money, but actually the investment you make in, you know, a couple of hundred quid for a really nice water bottle for everybody, that they arrive at rehearsals [...] everybody's got a name on their bottle and it's a little present [...] you wouldn't believe the goodwill that buys.

[...] they knew it took us a long time to get them, to write everybody's names, to put them on, and [Int18A] also prints the script for everyone and makes sure everybody is in the script, whereas if it's a job people turn up and do their job and they are very good at it and they are very committed but they don't expect those things.

One participant excitedly told me about the café at SPTO(A) being held open especially for the Pro-Am(A) participants, so that they could get hot food at a discounted price at any time during rehearsals.

Int17B said that some of the budget designated to their partner theatre from SPTO(B)'s CTF award had been ring-fenced for feeding participants during Pro-Am(B) events held in the building. Int17B had given this a lot of thought, and considered charging a nominal fee for food, but ultimately felt it was a cost worth absorbing because the gesture of hospitality would enhance the experience for participants.

At a Pro-Am(B) skills exchange weekend at a different partner theatre (Obs04B), the organisers gave a welcome speech on the opening morning. Participants were told that although food would not be served in the café, there were plenty of food outlets close by and they were welcome to eat food bought elsewhere in the café and foyer and encouraged to make themselves at home in the space.

Whilst no specific questions were asked in the fieldwork about this subject, the power of offering and sharing food to unify people and, along with other hospitable gestures, to generate goodwill from participants was confirmed by several interviewees.

5.2.5.2 Emotional investment

Over the course of the fieldwork, it became apparent that many participants made an emotional investment in the Pro-Am projects. This was manifested in two ways. First in their passionate commitment to theatre and the amount the art form meant to them:

Int08Bii: they are absolutely passionate about what they are doing. Absolutely give their everything to doing those things [...] you can manage people, but it's very hard to manage volunteers who have so much emotional investment in what they do.

The second example of emotional investment came through the practice of dramatic performance, when the participants were asked to open themselves up and show emotional vulnerability in order to connect with a character or situation. This is something which professionals are trained to be adept in, but non-professionals may need to be protected into an emotional connection with the play. This struck me after observing a rehearsal (Obs03A) in which the participants were asked to engage in an exercise which required them to open themselves up emotionally. I was acutely aware of my own position at this point, and did not take notes or watch the participants directly, as I did not want my presence to make them feel uncomfortable. I felt I was in a privileged position, and was privy to an extraordinary moment. Although the participants had signed up to 'share' and 'show' in front of an audience, they had to trust the practitioners that they would not be humiliated or exploited or become upset, and that everything they were being asked to do had a purpose.

This is not necessarily a reason to avoid working with non-professionals, as this type of emotional 'awakening' can happen in the creation of any art. Furthermore, managed carefully, this can be what makes Pro-Am performances powerful and motivates participation, because sharing such moments galvanises the participants. But once again, it highlights the need for experienced practitioners and shows that a mechanism for pastoral care is important. It also adds to the discussion on the legacy of Pro-Am projects and sustaining the relationships between the buildings and the participants, to ensure that the participants do not feel 'abandoned' when a production has ended.

There were some anecdotal stories where participants had told practitioners how much their participation had meant to them:

Int18A: *A woman in her 70s in the cast came up to me in the end and she gave me a big kiss and she said “this is what I did in 2013.” And thought [...] yeah, for some people that’s true.*

In some cases this had affected the practitioners and facilitators quite profoundly and was credited as one of the reasons they felt that Pro-Am work also benefitted the organisations, because it made the staff better at their jobs:

Int33B: *we keep saying, look we are not telling you how to, we are learning as much from you guys, I mean let’s face it, they teach me how to teach. And I come away having had a most amazing teaching experience because do you know what it’s the best I’ve ever taught. Cos they are telling you what they need. [...] This has been the highlight of my career, this project, this has been the most illuminating, humbling, joyous experience I have ever had. It is extraordinary.*

This highlights the powerful and recurrent theme of ‘learning’ across both case studies and shows that Pro-Am initiatives such as these are not simply cases of professionals teaching amateurs about theatre.

5.2.5.3 Public performance

This is the perceived risk that the participants have to perform in public and so must trust the practitioners that the production will be high quality, that they will not be embarrassed and that their investment in the process will have been worthwhile. As one practitioner put it: *“it’s part of our job to convince them what the audience will experience”*.

Int33B also noted that this perceived risk can apply to professional as well as amateur performers:

Int33B: *Of course they want to be good. There are all kinds of things, of issues going on for them, will they be good enough? And you know, lots of insecurities, natural insecurities, but I see that with professional actors all the time. Insecurity and the fear, the trepidation, the anxiety is the same.*

A Pro-Am(A) participant shared their experience of the process, describing the trust they put in the practitioners that everything they were learning was contributing to the final performance. They came along to each rehearsal excited to see *“what rabbit would be pulled out of the hat”*, described it as a *“fact finding mission”*, which was full of clues about the story and characters, and said that suddenly everything *“clicked into place”*:

Int26A: last year [production 3, Int26A's first theatrical experience] I jumped in the raft and just held on; this year I had more time to observe the scenery because I didn't have to hold on as tight.

When I asked for the most important things this participant had gained from Pro-Am(A) they said: “*experience, friendship*” and finally, validation of the decision to “*jump*” in the first place:

Int26A: It was only after [production 4] that it sunk in for me, and I have to give them [the Pro-Am(A) creative team] full respect for this, because they took a big gamble. I was in the middle of one of the most renowned theatres in the country, doing a monologue [...] And I think that's a testament to the whole ethos of [Pro-Am(A)] that they've got the guts to put productions like this on and also putting the trust in the community to come along and do it.

This comment highlights the trust that everyone involved in the Pro-Am theatre models, whatever their role, must place in each other and also shows appeal of public performance for the participants (Hughes, Stevenson and Gershovich, 2006).

Several participants from both case study projects had pursued professional work as a result of their Pro-Am experiences. I wondered whether the facilitators felt the responsibility of this and whether they saw it as a risk to introduce the participants to the professional domain in a safe and welcoming way, only for them to pursue a professional career, which is notoriously competitive and difficult to sustain. All the managers and practitioners agreed that they were offering an experience and not a ‘gateway’:

Int08Bi: we are not doing it as a training school to get people into the profession, if a couple of them do, brilliant, it's a fantastic experience for them. But the idea is that this is for them to make now. The theatre they are making now is legitimate.

Int21B: I think the vast majority are happy doing their normal jobs and it's something that they, they love doing it, they love the theatre, they love creating it. And this is a way of them, not doing it in a better way, but doing it in a different way.

Int19A: I don't think that's our responsibility. I think this is something that you come and be part of. I don't think it's, I don't think it's a bridge, I think it's an opportunity for people to learn and work with professionals. It's great cos often you will see those who want to be in the industry will take the professional actors aside and say, can I buy you a cup of tea and just rack your brain? [...] Access to just talk to people in the industry. Yes, on a friend to friend basis in the pub.

There was also an agreement amongst all interviewees that reviews of productions did not affect levels of participation. Whilst positive reviews were welcomed and used to advocate the projects by the SPTOs, there were seemingly no adverse effects from any negative

reviews. Two directors stated that unfavourable reviews were rare, and usually tended to galvanise the cast rather than diminish morale. One director asked for a moratorium on discussing reviews during the performance period. Another printed off a review which was largely positive but made some critical comments and stuck it on the wall backstage for everyone to discuss. Of the reviews of both case study productions I saw, critical comments were rare and tended to be about the play, the concept or technical elements and not the participants' performances.

5.2.6 Summary

The section has explored the different types of risk associated with introducing ambitious new participation initiatives into SPTOs. It has demonstrated that risk is a central theme because it had to be constantly moderated and mitigated, otherwise the projects could have failed. Given the high numbers of participants involved this could have adversely affected the reputations of the renowned organisations and in the case of Pro-Am(B), damage the already fragile relationship between amateur and professional theatre.

The Pro-Am relationship can be manifold, such as performing, writing, directing or backstage. High quality productions benefit all aspects of the project, but this responsibility lies with the practitioner, director or facilitator. Artistic risk was actively pursued and was a central tenet to both projects. The initiatives were open to all, so the varying levels of talent, ability and experience of the participants were not seen as a risk. However, the skills and experience of the creative teams were vital to the projects' success. This shows that infrastructure is key, because putting the right people in the right places means artistic risk can be encouraged, yet managed. The artistic risk of collaborating with external partners can lead to a clash of visions. The key is to have clear communication with all stakeholders, manage expectations on both sides, be prepared to change working practices and be adaptable, whilst protecting the participants' experience.

A CTF award can launch a project, but is finite, and so if there is a strong demand from participants, SPTOs need a continuation strategy. Both SPTOs subsidised the projects, but large casts and short runs of productions can make this investment hard to recoup, therefore the initiatives and their productions should be amalgamated into the overall annual budgeting

strategy. This evokes the findings on leadership and the holistic embedding of the initiative within the whole organisation. A strategic decision is also required on costs for participants and audiences. Participation in both case study projects was free in order to be as inclusive as possible, however, there were some operational costs for participants, such as travel. This is arguably unavoidable, but the organisers should take into account the investments made by participants which go beyond their time. Ticket prices had congruence with those for the smaller stages in the SPTOs, which shows a need to signify quality but not ostracise audiences.

Successful initiatives like these can put pressure on SPTOs to keep innovating and pushing boundaries. Both SPTOs committed to putting non-professionals on professional stages in their largest auditoria. This should be viewed as an opportunity for audience development and SPTOs should not rely on families and friends to fill seats. SPTO(A) in particular had a strategy for inviting new audiences into the building as well as new participants through Pro-Am(A).

The scale of the initiatives is a significant finding of this study, particularly in terms of risk and innovation. For the SPTOs, there are risks associated with finding the balance between resource management and demand uncertainty. The projects' leaders and facilitators must also balance the artistic ambitions of the productions with the logistic implications associated with large casts and large numbers of small casts. Once again, this shows the need for detailed planning, a strong infrastructure and keystone leadership.

Scale can also adversely affect the consistency of the experience for participants, and leaders should recognise the composite risk of time, emotional investment and public performance undertaken by the participants. The SPTOs' approach of 'hosting' participants can create significant amounts of goodwill and commitment. The findings from the section on innovation will explore how this is done in more detail. A mechanism for pastoral care is highly recommended and a participants' contract which sets out mutual expectations can be valuable. Participants should be able to trust and understand the purpose of each part of the process, which can be achieved through 'scaffolding' the project. This means that external practitioners may also occasionally need support when working with non-professional casts.

There was a general consensus that the benefits of Pro-Am initiatives to the organisation outweighed the risks. Success was based on the balanced management of risk to the

organisation and perceived risk of the participants. It is obvious that managing risk is important, but scrutinising the theme of risk has showed how these large and complex initiatives are managed and contained and how their objectives can be realised and challenges addressed. In the final findings section I explore the inner workings of the projects, to understand what makes them innovative.

5.3 Innovation findings

Having considered *why* leaders of SPTOs make the strategic decision to incorporate large-scale Pro-Am initiatives into the organisation and the ways in which the associated risks are recognised and mitigated, this section of the findings chapter examines *how* SPTOs create and facilitate the initiatives. Theatre organisations creating outreach opportunities is not a new phenomenon, but I have studied the ways in which Pro-Am(A) and Pro-Am(B) have developed, with a view to understanding what makes them distinctive and how SPTOs are adapting their working practices by finding creative ways to address the challenges of large scale Pro-Am theatre.

This section addresses the two main considerations for SPTOs creating Pro-Am projects: the *process* and *product*. Achieving the balance between these two elements is vital. Put simply, the creative process must be fun and motivating enough for the volunteer participants to commit to the project, whilst also creating an end product of a high quality production for the ticket-buying public. As well as exploring this crucial dichotomy, this section also contains findings on the ways in which the SPTOs manage large numbers of participants within their spaces, and the implications of marketing Pro-Am projects to participants and audiences.

The two case study Pro-Am initiatives are innovative in two ways. First, for the simple fact that neither organisation has attempted anything like them before, as they are outside the SPTOs' usual remit of producing fully professional plays, or previous outreach projects. Second, these initiatives are innovative in their scale and ambition, and so this part of the chapter explores how they happen, how the basic stages of theatre-making (idea, plan, audition, rehearse, show) have to be adapted and the effects these initiatives have on their organisations.

5.3.1 The process

In this section I look at how the on-going processes operate and evolve within the two case study models and consider what makes them innovative.

As with Pro-Am(B), the Pro-Am(A) application form was used to communicate information about the objectives of the project and the level of commitment required. For each Pro-Am(A) production, an ensemble approach was used for auditions and casting, rather than looking for performers for specific individual roles, although the directors did have an awareness of suitability for certain roles, if working from a script:

Int04A: the auditions are looking at how people engage with each other, how people take on board ideas and direction, and how they perform something as well.

Int06A highlighted the importance of the audition workshops in the process and product dichotomy. The audition was the start of the journey of engagement with the participants and so Int06A wanted them to be stimulating and enjoyable:

Int06Aii: part of the experience is also giving people an audition. So the audition itself is part of the process and those people who came to the auditions, I hope they enjoyed them in their own right.

The commissioned plays for Pro-Am(A) were often written in ways which made them easier to rehearse, with the cast split into groups. This extensive workshop and rehearsal schedule, usually lasting six to eight weeks, meant the staff were working lots of evenings and weekends. I asked how this system worked for the internal staff who were working on the project, who also had duties in the building during the day. Int06A said that everyone working for the organisation understood the need for flexibility because theatre is a distinct art form, in that the buildings run on a 9 to 5 basis, but the actual productions being created and administered mostly take place 'out of hours'. So although there was an expectation of staff to facilitate the Pro-Am(A) programme of work which went beyond their daily duties, there was a relaxed approach, and if a member of staff ran an evening rehearsal, they were not expected into work as early the next day.

One consistency in all the rehearsals I observed was the attention to detail and level of expectation required of the participants. The process worked much as I would expect to see with professional actors, with a great deal of emphasis on character and narrative. There was next to no 'blocking', a rehearsal method seen often, but not exclusively, in amateur theatre.

This is where, for the pragmatic reason of only rehearsing once a week, a scene is built through determining where the performers stand to say their lines and how they move around the stage. I asked Int06A, an experienced professional actor and director, how their working process differed with the Pro-Am participants:

Int06Ai: it's rigour, discipline, and also imagination. It's unleashing their imagination to be able to inhabit these characters as fully as they can [...] it's no different to working with a professional company. Discipline and imagination, are the two things it always boils down to. Always.

Interviewer: So do you approach it in a similar way?

Int06Ai: Yeah, yeah, oh yeah. The only difference is that, you know you're working with [...] a wider range of experience. So, some people will have worked a lot with us, and elsewhere you know in other amateur companies all over the city and they'll be used to performing. Others will be doing it for the first time. [...] so there's a real wide range of experience and you have to account for that. But, the expectation isn't less.

So the practitioners were not looking for 'talent', but other qualities and were also careful to account for levels of experience. Again, the emphasis seemed to be on learning. This was supported by Int07A, Int01A, Int18A, Int08B and Int33B, who all said that attitude and generosity of spirit, enthusiasm, and listening were far more important than ability.

Maintaining the discipline needed to create a production with a large cast whilst also keeping the process fun and engaging was a challenge which struck me in rehearsals:

Obs01A: As they become comfortable there is more chatter and [Int01A] has to keep reminding them to listen to each other. Professionals wouldn't do this. Tricky when making it fun can lose the discipline. I think this is when the practice becomes innovative and slightly different from working with professional actors, all about the process and product - keeping it fun while building the rigour.

In Obs01A, Obs02A, Obs05B and Obs06B, I saw the sessions build gradually, with the participants growing in confidence. The practitioners guided them steadily through the process, constantly reiterating the value and purpose of everything they were being asked to do:

Obs10A: I count about ten staff coming and going, people taking notes, documenting with a video camera, taking stills, stage management. Int06A and Int19A are standing on chairs. They try to keep the energy up and not have any

pauses as this allows for talking and whispering which gets out of control quickly. They only have to ask for quiet once or twice though. The cast can ask questions openly and easily. [...] Momentum seems to be key. [...] People who were absent during the smaller rehearsals when this section was broken down are encouraged to look for a neighbour to guide them. They use one group who are doing it well to demonstrate how to do a certain move to other groups. Encouraged again to help each other out. Huge amounts of energy required by the creatives. The ensemble dynamic is constantly cultivated.

This ensemble dynamic in which was cultivated in rehearsals resonates with the example of the intergenerational theatre process presented by Gildin et al (2013).

In Obs11A, during a post-show audience discussion after a Pro-Am(A) production 3 performance, the director (Int06A) was asked how the experience of directing that show differed to a professional one. The response was “*I had to up my game*”. In our next interview I asked Int06A to expand on this:

***Int06Aii:** a whole load of reasons, one was because there was so many of them, so that was the largest cast I've ever worked with and it's a different way of working [...]*

So, there was just stamina, but also having to find ways to communicate with people who weren't trained and who don't necessarily have the same vocabulary, or the same err shorthand. So trying to find ways to discuss and to analyse what makes a good actor or what makes good acting or a great performance and erm to get them there, [...] and feel confident [...] and not patronise them but be very demanding of them in a very healthy way. All of that is very new and [...] I learnt a hell of a lot actually.

Int27A, who had been in several productions and had also been in the community chorus of an SPTO(A) professional production, shared their experience of Int06A's directing style. Int06A made a singing rehearsal for production 3 less daunting by giving everyone a choice of two songs. Both were well-known songs but were from different eras, to complement the intergenerational nature of the group:

***Int27A:** So you organised yourself into what you wanted to sing and groups sang to each other. Eventually it came down to you singing on your own to a room of forty people. But it didn't feel like it, it had been 'debunked' really cleverly, in the space of two hours, and it was joyous. Well, singing is joyous.*

I assumed that as this model of breaking the large cast into small groups had worked so successfully that SPTO(A) would permanently adopt it, but this all changed with production 4. As previously stated, the collaborating theatre company charged with creating the production decided to ask the participants if they would all like to attend each rehearsal. This

helped to forge the whole cast and creative team as a 'gang'. The creative team stated they were very careful however to not waste anyone's time and make sure people were not sitting around waiting for long periods. Int27A, who was also in production 4, confirmed that every minute was used, which was different from their amateur theatre experience, where there is often lots of social time:

Int27A: In terms of everything, time, keeping quiet, everything that comes with professional theatre, even though these aren't professional people, the level of expectation is up there [gestures up to the ceiling] [...] here at 6.31 we were off and we weren't gonna stop till 9.30 except for the break. The time was used all the time.

The expectation to be treated as professionals was a significant motivator for all the participants I interviewed:

Int27A: Even to the point like within three weeks of starting to sing we were doing four part harmonies and getting told off for coming in too early. But nobody balked at that, we just soaked it up. I would say that was the thing, we were living the dream. The musical director was amazing, making you work hard and getting your brain going, it's very stimulating, once you're involved, once you're on the boat. I was taking the dogs for a walk singing. They know how to work with the strengths of the people who are there.

Another participant stated "everybody is accessible" and that "there's very much a nurturing quality in it". This shows how Pro-Am(A) was striking the balance of professional expectations and a rigorous process with a friendly, welcoming atmosphere, whereby each of the hundred or more participants felt they could approach the staff at any time. Another director gave me their viewpoint on selecting the participants:

Int18A: So there are people who come to this process who do not have any of the skills, or techniques, or even necessarily natural talent, but they will be equally valid and important in the play. So no hiding behind the furniture. And then it's our job, specifically the job of my team then, to make sure that they all can be in this play brilliantly. Could they go on and be in another play brilliantly? I've no idea, but they are gonna be good in this one. And that's our job [...] all of them are endlessly fascinating, and if they're endlessly fascinating and they're willing to put a decent shift of work in, then they're in the play. And then, they weren't auditioning for parts, I was just looking for a gang. I needed a gang of no more than 170 I think.

Int19A expanded on how the creative process worked for Pro-Am(A) production 4:

Int19A: we don't cast the speaking parts until the very latest point [...] people can surprise you, and because also once again this is not people [...] who are professionals. [Professionals] come on the day to auditions with, they have had training, and they come with their best foot forward. Whereas a lot of these people

come on a Saturday morning and they have had work every night that week or they are exhausted or they have had trouble at home with child care or something you know, so it's quite unfair. I always think auditions are quite hard to judge [...]

The creative teams who facilitate Pro-Am projects always have to be selective to a certain extent. They have to be arbiters of who can take part and what roles they get, but this is unavoidable given the numbers of people who audition, as even with an ensemble piece, there will be some roles which have more prominence than others. Int19A explained that there were no barriers to taking part, such as age, disability, shyness or fear of performing. In fact, some of the most rewarding moments for them as practitioners were when they offered roles to participants who did not expect to be featured prominently. The skills development workshops were used as a way to get to know the cast and decide who to assign certain character roles to, and for the cast members to learn more about the production. The difficulty however, was when a participant signed up who then did not get the role they wanted and so did not commit to rehearsals:

***Int19A:** Most of the time those people are the ones who drop out anyway. Actually because they realise what a huge commitment it is, so in a way sometimes even if we go, oh we sense a bit of attitude there, we will put them in and see how they last, they usually are the ones that drop out. We always have a drop out percentage which is normal in every production I have ever done [...] sometimes that's cos they have realised it isn't a show they wanted to be in or they didn't get the part they thought they wanted or, they simply can't, work commitments or something, can't do it.*

[...] if someone has completely no awareness [...] that's very hard to manage in a big cast, and if anybody else in danger, if we sense that there is someone who might put the other cast members in danger, I think those are our two lines. Most of the time we just try and take everybody if we can, because if they have decided to come and they want to be in it then they can be and then they have got the workshops to work out whether they still want to be in it.

The practitioners and facilitators stated the benefits of constant communication, and giving as much information to participants as possible about the production, so they understood what they were being asked to be involved in from the start.

Involving participants in the creative process and giving them ownership of the work was a common refrain, whether the play was scripted or devised:

***Obs01A:** [Int01A] explains history of [Pro-Am(A)] [...] tells them SPTO(A) want to do a project that can only be done by these people, in this place and time and can*

*never be done again. Each piece is unique. Giving them ownership from the start.
"Only you guys can do this play".*

Having seen how this director tried to embolden the participants by explaining that they owned the production and their contribution to it was valued, I wanted to understand how Int01A also gave the participants ownership of the work through the creative practice of the rehearsal process:

Obs02A: *I am aware of the way they listen to each other, respect, engage, be in the moment, play, try, fail etc. I think it comes more from them as people being interested in the process and [Int01A's] direction, rather their skill and experience as actors. It is organic and it is real. [Int01A] pushes them to be creative, no blocking here. They are heavily invested in the piece right from the start. I understand now what [Int01A] has said before about ownership of the piece. It belongs to them. They are investigating the complexities, nuances and choices of the piece, the text and the characters, together.*

Pro-Am(A) production 4 had very few speaking parts for such a large cast, but the aim was that everyone was made to feel valid and important. This was done through practice. One interviewee told me that rhetoric was not enough, because if the participants did not feel invested then they would not come to rehearsals and the production would fail. The practitioners did not spell out the rules for 'best practice': "I just assume they are going to go with me. And if they don't that's probably my fault" was a personal view of one practitioner which resonated through the interview data.

Int19A: *if we are not wasting their time, they don't make it hard for us [...] we don't really have that kind of discipline problem. Because right from the beginning they feel like it's theirs. And that's very important.*

Pro-Am(A) participants often 'managed' themselves through the process. They would contact each other outside of rehearsals and meet to work on dance routines or songs, sometimes sharing research materials about the production online. This aligns with the collective approach to theatre-making which already existed within the amateur companies of Pro-Am(B) and helped to unite the participants. Another trend which developed in Pro-Am(A) was the printing of production t-shirts for all the company and creatives, which also seemed to have a galvanising effect and gave participants a tangible memento of their participation.

Interviewees in both case studies referred to the Pro-Am process as a sort of 'machine', given its scale. This factor sometimes affected the methods of the practitioners:

Int19A: I tend to prepare more for the non-professional rehearsals and that is not because they are any worse, some of them are even better than professionals we work with, but it allows me to work faster [...]

Sometimes we only do one scene [gives example], we probably only did that three or four times in total before we started running the show and also because there are so many of them you have to give them confidence they know exactly what they are doing, not because they need any more confidence but because there is not as much room for them all to put their hands up and ask their questions [...]

So I have to be very confident about what I'm doing and very clear, and then the other thing is err, I tend to write up things for them a lot.

So all the scene changes in act one, I made a huge document which said exactly who is coming on from where. And I draw a diagram [...] and I hand a photocopy of that document to everyone so they can all follow and transfer that information to their script. Which I would expect a professional actor to do themselves. And it's not that once again that the non-professional actors are not capable, they just don't have the time.

This shows once again how the scale of the projects requires the practitioners to adapt their working practices.

Pro-Am theatre productions can be both enlightening and challenging for the professional performers who are sometimes involved. The Pro-Am(A) model offered three participation opportunities for the adult participants: professional productions containing Pro-Am members as a 'chorus', full-scale Pro-Am(A) productions, and Pro-Am productions containing one or several professional actors. This third application occurred in two of the four Pro-Am(A) productions to date, and was selected for several reasons. According to one interviewee, the professional performer or performers often acted as a 'spine' for the play, and were on stage for most of it:

Int06Aii: they're working with four professional actors. So, because there are these parts in [production 4] that require great skill and stamina, we decided actually it might benefit both those performers and [Pro-Am(A)] [...] for the professional and the community to link [...] together and, for them to share the burden of this.

Not all of the central roles went to professional actors, but for those that did, it meant the director and creative team could work with them during the day, and the community cast members in the evening. Another reason was that the professional performers could perform a type of mentoring role for participants:

Int18A: They have to be brilliant actors, but there are a lot of brilliant actors out there. All of these guys sat down and I absolutely explained that it was also a leadership role. That they are on-the-pitch captains.

Int06A, Int01A and Int19A also highlighted the importance of the whole cast being treated equally, and that the professional actors were not given higher status than the community cast. When casting the professional performers, directors looked for certain qualities, namely that they would understand they were part of an ensemble and not the 'star'. In fact, I noticed the term, 'guest performer' was often used by interviewees, and the word 'professional' was avoided, perhaps in case this labelled the participants as lesser in some way. I did not interview any of these professional performers, but I was told they all found it to be resoundingly positive and a unique experience. As one member of the co-producing company who was working with SPTO(A) on Pro-Am(A) production 4 stated:

Int19A: [name of professional actor] is personally handwriting every single person a card for press night, which I have never even done, 150 cards. [...] And that's what I love about them. [...] We work really hard for that. It takes a little while to explain to the building that we don't want them to have anything separate, even on the photos, if you will see on the wall, whole cast photos up, we want every single person's photo. If you are going to put cast photos up don't just put the four professionals, we want the 150 people on that wall. That's really important to us.

The importance of values was a recurring theme in the Pro-Am(A) case study. This meant protecting the values of professional theatre-making and offering these to the participants. But their participation was also demonstrably valued in other ways, such as with pastoral care and the offer of the same benefits that professional actors engaged by the organisation receive. For example, participants received free ticket allocation and were given a lanyard for the duration of the rehearsal process which signified them as a company member and could be used to get a discount at all the SPTO(A) food and drink outlets (Doc14A).

One Pro-Am(A) facilitator told me they felt extremely protective of the Pro-Am(A) participants. This person liaised with external practitioners to set out a 'baseline' level of expectations to help them achieve their artistic objectives whilst protecting Pro-Am(A). They also endeavoured to maintain an open line of communication with the participants, so that they all knew which staff members they should approach with any concerns:

Int23A: it's a dialogue [between SPTO(A) and the participants], if it's not working for you we want to hear from you and grow in our understanding of what it is. It's like, you know [the participants] own [Pro-Am(A)] [...] So that's my approach to it.

This sentiment was echoed by Int09X and Int10X and occurred again within the Pro-Am(B) case study.

Int08B told me that phase 1 of Pro-Am(B) had tried to be too many things to too many people. Phase 2 had far fewer groups and was more focussed, with workshops designed for amateur theatre company directors:

Int08Bi: the directors were [...] people who make things happen. They were also more than likely going to direct another show and another show and another show. So if we wanted to affect the sector, it is a little bit like investing in a teacher to affect education, so investing in those directors was a real priority.

Int08B stated that the dynamic between the amateurs and the professional practitioners had generally been very positive, and that the project had been approached with honesty, openness and humility:

Int08Bi: we are trying to talk about the amateurs in a way that, you know, they wouldn't mind hearing for themselves. [...] I think they find us as funny as we find them. So we try not to be too po-faced about it, or too much to try and say, oh everything they do is brilliant. I think we couch that usually by saying, but look, everything professionals do isn't that brilliant so it is not that dissimilar.

SPTO(B) endeavoured to cover as much ground as possible and offer additional support to participants whose partner theatre did not have a permanent member of staff assigned to the project.

One of the lead Pro-Am(B) practitioners explained that SPTO(B) had tried to offer a wide range of skills and technical workshops, and that the objective was a broad dialogue about all aspects of theatre-making, not just offering acting classes:

Int33B: we have X amount of directors who would come every month, once a month to work with all the practitioners right across the arc of the industry. Wig-makers, costumiers, stage management, lighting, sound, automation [...] voice, movement, directors, front-of-house. I mean you name it they got a whole day once a month. So I always likened it to a degree like an MA for the directors, like an MA in theatre. [...] And then you go away and practise it, and then that practise is supported and then mentored by regional [mentors and theatres].

A Pro-Am(B) mentor reiterated this, and also explained how they conversed with the amateur groups in order to develop a programme of workshops which the amateurs felt would best benefit them. It was a collaborative process: “So we have tailored that work to whatever they needed it to be” (Int21B). Tailoring the offering to the groups is innovative, especially as with

such a big project it would have been easier to take a 'one-size-fits-all' approach. This shows the scale, ambition, and commitment to professional standards, which again, resonates with Pro-Am(A). Another commonality with Pro-Am(A) was the desire by the practitioners to offer as close an experience to professional practice as possible, but that some allowances and adaptations had to be made:

***Int21B:** I try not to [change approach between directing amateurs and professionals]; err, just because they get as honest a kind of experience as possible. But occasionally I mean [...] for the weekends [technically preparing the] showcase. I was using language that I would use in a technical rehearsal in professional theatre and then just kind of realised actually that they are amateurs and so just have to go back and slightly explain what I needed. And once we had got used to that language they were fine. Err, so occasionally you would have to kind of change what you are saying, but as much as, and particularly directing with them I kept it as [...] real as possible.*

The importance of vocabulary was echoed by Int33B and Int06A, who stated that whilst their working practice did not change with non-professional performers, they often had to find new ways of communicating to account for the participants' varying degrees of theatrical experience and the absence of the shorthand of theatrical parlance that exists with professional actors.

As with Pro-Am(A), the concept of ownership and investment were also prevalent in the Pro-Am(B) process. During an introductory session to a skills exchange weekend, Int08B addressed a theatre full of participants:

***Obs04B:** [Int08B] tells them [Pro-Am(B)] might sound like a patronising project but it's not about [SPTO(B)] coming and telling amateur groups who've been doing it for 75 years how to do it. [Int08B] says it's about sharing how we do things and us learning how you do it. There are more things we have in common than differences. [Int08B] has been impressed with how open everyone has been so far [in the project's history].*

[Int08B] says it's important not to see today's workshop as being about the 'basics', but the 'fundamentals' – don't go home thinking the workshop was nice but you've not got time. Remember, we [SPTO(B)] have the luxury of time, four weeks to rehearse. But, we pay our actors and if we could pay them for less time we would! [laughter] So it's all about efficiency. These techniques can be done in your groups. We don't know how to make amateur theatre, you do!

This idea of offering the amateurs effective, practical techniques to use in rehearsals was also signified by Int33B as a key professional skill they hoped the participants would take away, "it's about efficiency in the rehearsal room".

This highly experienced practitioner had worked with many professionals throughout their career and also many amateurs over the course of the six years of Pro-Am(B). I asked them to reflect on the principal differences between working with two groups:

***Int33B:** So, [newly trained professionals] they are all in their bodies, they are chirpy, they are all alive, they are all on the front foot, they are all engaged, their listening is heightened, their sense of focus is there. And anything I throw at them I don't have to repeat myself. [...] and of course when you come to the [experienced] professional group things are even more heightened. Because in the rehearsal room, you are, you have got to get a job done. And you have got a limited amount of time to do it [...] and I can fast track it and they will have a vocabulary. If I say to you, I'm not hearing the thought [...] you know exactly what I mean.*

[In] the amateur world [...] what they are doing is building brick by brick. And you are trying to be slow and guiding and sure footed but you are not losing the rigour. I mean I like to think that my workshops are true rehearsal conditions. And I don't, I don't dilute it; I don't in any way dumb it down. I don't let them get away with anything. I don't take prisoners, and I say, look I'm treating you like I would treat a professional actor in my room. Obviously there is a bit of guard because people don't move as well. There is an age issue. All kinds of err, I mean I think what drama school does is that for three years it just kicks self-consciousness out, self-consciousness is kicked out of you [...] I think that's the fundamental difference and what they [the amateurs] have is buckets full of self-consciousness. And what I'm trying to do is fast track getting rid of the self-consciousness while I'm still building a play.

The concept of trained professionals being focussed and on the “front foot” and amateurs needing lots of encouragement and guidance to build their confidence through a creative process they could trust, which once again resonates with the theory on ‘scaffolding (Simon, 2010), was also highlighted by Int19A and Int06A:

***Int06Aii:** They really want to do it and they really want to be challenged and they really want to open up, and I'm not saying that professional actors don't, it's just probably because they have more knowledge they know that they can save it till press night or save it till the first time they meet an audience. Whereas [Pro-Am(A) participants] don't have that experience. [...] Repetition becomes an essential tool.*

So I find myself repeating more and more and more than I would with a professional cast [...] even learning lines, you know, if it's something that you're used to doing, it's a muscle. So the brain can just do it more quickly. Whereas if you're not used to learning lines, repetition is the only way.

I observed one of Int33B's workshops and as well as the theatrical skills element, there were also many references to the broader objective of the project, an improved relationship and understanding between the amateur and professional worlds:

Obs05B: Keyword is sharing. [Int33B] mentions there are preconceptions and barriers from amateur to professional worlds too, e.g. [SPTO(B)] has money and time and pro actors who know what they're doing, but no says [Int33B], the pros can struggle too and need to work with the practitioners to go through the process. [Int33B] says [SPTO(B)] and other professional organisations don't know how on earth amateur groups put a show together by rehearsing once a week for two hours or sometimes less. [SPTO(B)] want to ask, how do you do that and what can we learn from you?

Int08B recognised that 'amateurs' did not mean one homogenous group, all with the same motivations and abilities, and that each individual participant may get different benefits from their involvement in their amateur company. So SPTO(B) wanted to make Pro-Am(B) as relevant and meaningful as possible to all different types of amateur theatre-makers:

Int08Bi: it depends on how much your commitment is within the cast. So you might have one guy playing Hamlet who is absolutely living it, he wants to do everything, and you can give him tons of homework, you can give him all these exercises to do and he can go for it. [...] Some guy is playing Rosencrantz, he is only here every other Tuesday, he quite likes this, it is a good laugh [...] but you know, he is not massively committed. And actually the workshop games, he is going to love doing those games. They will make him a better performer and keep him alive on stage and add more fun.

So I think it is trying to get that message out there at the same time. [...] This can make things more fun in your rehearsal, more enjoyable, make your show better, and for those that want to be more committed there is loads more to dig at.

I observed several instances where the practitioners gave the participants specific stagecraft techniques:

Obs05B: I notice half way through an exercise [Int33B] stops a participant, gives them a note then when they try to restart, and tells them to go back to the beginning. [Int33B] says, always go back to the beginning. It's a simple, specific technique they can take straight back to their groups and practically apply to their own rehearsals and see the results.

Additionally, and perhaps more importantly, as with Pro-Am(A) workshops and rehearsals, I got the sense Pro-Am(B) participants were also being encouraged to be an ensemble, to listen, respect each other and collaborate. A common observation was participants being encouraged to try and to fail, and then to fail again, that there was no need to feel foolish, because the creative process should be fun, and there should not be pressure 'get it right'. This also had the by-product of consolidating them more solidly as a group.

Another parallel with Pro-Am(A) was that the Pro-Am(B) facilitators and practitioners felt that the participants wanted a rigorous process, during which they were treated with the same level of expectation as professional performers.

Int08B used the analogy that if someone's hobby is enacting medieval battles, that person is probably not going to do it half-heartedly, but will want to have the correct sword and the authentic uniform, and their enjoyment will largely be based on getting the details right:

Int08Bi: and that's the fun, of doing it as well as you can possibly do it. And most of them want that, they want to do it as well as they possibly can. And I think that sometimes the beginners worry, is this going to be earnest? But then teaching theatre skills doesn't have to be a massively earnest business. You can do this in an enjoyable way.

And actually the process of making a modern piece of theatre, [...] if you put that process in an amateur context, it's more enjoyable, everybody in the room is able to figure out how this play is being made, everybody in the room is a participant in making this, and that ensemble way of working is more fun than erm, than one that makes the director have to tell everybody what to do, which is less fun and less enjoyable for the majority of people who are taking part [...]

Rigour is a really good word and I think if there is not enough rigour it is not that much fun doing it.

Several interviewees agreed that the process was important in terms of delivering the benefits of participation, but some also warned of the over-emphasis on process leading to a compromise on the quality of the end product.

The skills-based workshops were, for the most part, a resounding success in both case studies. This idea of 'upskilling' seemed to motivate participants greatly. For example, one elderly participant I spoke to particularly enjoyed the stage combat workshop, and also loved learning the new technology of microphones and headphones. This participant told me that when reaching a certain age, it is easy to "put yourself in a box of not being able to do things", but performing opened up the chance to do or be anything. When I asked this participant why they signed up for Pro-Am projects, they replied: "The chance to work with professional people, and the discipline."

Pacing the Pro-Am project is an important factor, which no interviewee mentioned explicitly, but which recurred across the data. This reflection was informed by the literature on pacing a research project, used in the methodology chapter (Richards and Morse, 2013; Hunt, 2010):

Int18A: if they [the participants] feel like they're not running alongside you they become very unhappy. [...] and the amount of time you put into, because they are running alongside you, rather than you dragging them up a hill, is huge. But if you don't do it then you're not doing it properly.

Pacing is not only a vital operational concern, but is also significant to the participants' experience. For example, in Pro-Am(A) productions 2 and 3, the participants rehearsed in separate groups. In both instances, when the piece started to come together and the participants saw each other's scenes for the first time, the whole process seemed to undergo a surge of energy, and several participants noted this was a special moment. Contrastingly in Pro-Am(B), the pacing was a challenge, with some participants struggling with the fact that their showcase took place months after their production had ended and it was hard to regain momentum. In some cases, this seemed to create more pressure than it did enjoyment. Therefore, SPTOs should carefully consider the pacing of the Pro-Am creative process.

Managing expectations of all stakeholders was also shown to be an integral part of the Pro-Am process. This was challenging with high numbers of participants, but setting out as much information as possible in advance, as already shown in Doc07B and Doc14A, and maintaining clear and consistent communication made the participants feel valued and that the SPTOs were there to support them.

Maintaining discipline can be difficult, and participants being late, absent, or even dropping out can destabilise the process and threaten productions. The general attitude amongst the practitioners and facilitators was that the responsibility for this lies largely with them, because if they are delivering a stimulating process, then participants should want to turn up and commit. Allowances were made as far as possible but 'keeping track' of so many participants was a significant administrative challenge in both case studies.

I asked all the practitioners and facilitators what they felt were the key qualities or skills needed for the process of creating large-scale Pro-Am projects. For the practitioners, the general consensus was that a lot of patience and passion are required, along with enjoyment of the process which the participants can share in, stretching the participants, and delivering a rigorous process but injecting it with fun, and *"consistency of approach, so you know that on the whole you're treating everybody as they would wish to be treated and that everybody gets the same care and attention"*. For the facilitators, it was principally about administering

the project and sustaining good communication with all involved, and in so doing, enabling the practitioners “to do what they do best.”

5.3.2 The product

In the literature review two meanings of the Pro-Am ‘product’ emerged: the product which results from the creative process, the production; and the product of the overall Pro-Am project. Through the data analysis process a more abstract form of ‘product’ became evident which is the outcome of each Pro-Am initiative. For example, in the case of Pro-Am(B), the end product is not just each individual production and the showcases, but the development in the relationship between amateur and professional theatre-makers, and the skills and working practices that the participants took back to their amateur companies to be utilised in myriad future productions.

Int18A shared the passionate belief that regional theatres should be creating theatre for their city, with people from their city: “*new writing sells!*” Some SPTO(A) staff suggested that Pro-Am(A) shows sold well on the basis that Pro-Am(A) was developing a reputation for large, impressive productions.

I asked one of the writers of a Pro-Am(A) production to reflect on the final outcome:

Int32A: I think it was absolutely outstanding. [...] take myself out of the equation, I think it was a remarkable thing, it was huge and it was about ideas and it was brilliantly done.

In terms of the legacy of productions such as the epic Pro-Am(A) production 4, there was disagreement as to whether the same play could be staged in other cities. One interviewee felt it could, as long as the resources were available. This meant not only the financial resource, but also a large and willing cast of participants and a skilled creative team. However, another interviewee felt that the play was created for that unique group of people at that particular time, and that recreating it with a different set of people would be less effective. In addition to this “*every city will want their own one.*” This echoed the reflections of another Pro-Am(A) practitioner, who felt the success of the concept lay in the participants feeling like each new play, as well as the production, belonged to them. However, if more regional

theatres were to develop similar initiatives then this could lead to opportunities for playwrights to create a collection of new 'epic' plays for large casts.

The many productions which were created by the Pro-Am(B) programme were varied in size and scale:

***Doc02B:** There was much to admire in these productions in their ambition energy and talent, although the standard was understandably varied from the very basic to the near-professional. This often depended on the experience of the theatre makers, which varied from those taking part in theatre for the first time to veterans of many productions and some training. We also saw companies taking on Shakespeare for the first time and companies who had been performing his work long before the creation of the [SPTO(B)]. We found not only a genuine passion for Shakespeare's work from many participants, but from some of the more experienced groups and individuals a deep knowledge of the text.*

Doc02B also remarks that many productions were further enhanced by the backgrounds and occupations of the participants, such as a former soldier playing Henry V:

***Doc02B:** For many the strength of the production came from the identity of the participants. Here not being a paid professional became the point [...] These productions transcended the boundary between professional theatre and amateur, and spoke of the power of Shakespeare's words in the hands of people for whom they really mean something.*

This was further evidenced by a Pro-Am(B) participant whose company were preparing an ambitious new production, inspired by the project:

***Doc02B:** Performing at [SPTO(B) theatre] for the regional showcase, gave [name of amateur company] so much energy and confidence, they were proud of their achievement. The experience continues to have effect, to the extent that we will be exploring a Shakespeare play again for 2014 and will be taking it to the Edinburgh Fringe Festival.*

Int08B felt that a significant product which emerged from the project was the development of a 'third way' of working, which differed to the 'amateur way' and the 'professional way':

***Int08Bi:** So you get loads of people coming out of the room going, wow I had not thought of that. And that is not because we are geniuses, I think it is just that we have been working on professional ways of doing that for years. [...] Movement has gone through all sorts of ideas and ways of working, as has voice and all these things.*

And we are able to pass on a sort of refined version of that [...] And they recognise these are really useful straight away. And the difference from students is that they

are immediately going to use them. So you know that the next evening or the next week they are going to try that idea out.

The approach was to share professional practice with the amateur participants. What made the techniques professional was that they had been refined over a long period of time by the experienced practitioners. The SPTO(B) facilitators had the pragmatic approach to offer practical techniques, inviting the participants to take what was useful to them and leave what was not. For example, in amateur theatre the model is often: read, block and practise. Professionals play, fail and experiment. Rather than being encouraged to make theatre the way SPTO(B) did, the participants were encouraged to find a new hybrid way of working:

***Int08Bi:** there is a kind of third way if you know what I mean, which is an amalgam of the best of amateur and the best of professional. And I think we are not saying, do everything like we do it. And I think the interesting moments is where you find a third way. So those kind of big discussions [...] what can we come up with as a solution that doesn't mean you have to just be like us. Because then you are still just putting on the make-up even though the lights are better. Do you know what I mean? You are just doing something just to play at being a professional rather than doing something that will help your play be better.*

This pursuit of a third way of working shows how Pro-Am(B) was innovative in its approach to theatre-making. The amateur participants were offered practical solutions to challenges, such as bringing technical elements like light and sound into the early stages of the rehearsal process, rather than at the very end.

The regional showcases also helped SPTO(B) develop audiences by introducing to the organisation people who might have been intimidated by the lofty reputation of SPTO(B), but supported their local amateur company. I attended a regional showcase at SPTO(B):

***Obs13B:** Lots of people are milling around in costumes beforehand, not the same level of anticipation as a professional show in that sense. The auditorium is full. [Int08B] gives a welcome speech. A sonnet is read to mark each new scene. Clever idea and works well. The set is simple, steps at rear, light stone tiled floor, entrances at four corners. Slick and professional looking. [...] The performers have to keep up the energy and pick up cues as only have ten minutes for each extract. The programme is free and handed to everyone on the way in. I needed it because it explains each extract. I've been here before to see a professional show and it feels the same - light, sound, stage etc. all have the same feeling. The show is stage-managed brilliantly. The performers change costumes at the sides of stage but it doesn't take you out of it. [Int08B] tells us at the end there have been about 200 performers on stage tonight and the [SPTOB] team has tech'd and dressed fourteen*

shows in one day. [Int08B] closes with a brief speech saying [Pro-Am(B)] is about showing that Shakespeare is the people's playwright and belongs to everyone.

The extracts of fourteen different productions which flowed together as one coherent evening of theatre, performed with passion by the amateur participants, made for an innovative and exciting theatrical experience. I also wrote the word “joyful” in my research journal when I reflected on the showcase the following day. There was definitely a different atmosphere to the professional productions I had seen on the same stage. This was also true of the Pro-Am(A) large-scale productions. I would describe it as an exchange of joy between the participants performing on the professional stage and the supportive audience watching them. My experience aligned with Int08B's reflection on the showcases:

Int08Bii: Where it worked well is, because they are doing extracts and there are maybe ten companies something like that doing an extract, you have got some audience from each of those ten companies. [...] so actually the majority of audience don't have any connection to each extract. So actually they are quite an honest audience [...] the audience were very supportive, understood what they were looking at. Err, and understood the context of it, and [...] the performances were good on the evening and actually sewed together quite well.

As well as the showcases, there was one fully amateur production directed by the SPTO(B) practitioners which was part of Pro-Am(B) phase 1:

Int21B: [SPTO(B)] knew they needed to have some kind of end product for the first year of [Pro-Am(B)] and the idea came about that the [assistant director], and I would direct a version of [name of play] with a completely amateur ensemble. [...] we auditioned three hundred amateurs from across [the] region, they had to live within an hour of [SPTO(B)] Err, we got the number down to thirty and then we did a performance in the [SPTO(B)] theatre].

We rehearsed for probably about two and a half to three months. [...] It was an amazing opportunity because it gave us the chance to work on a big stage and with a big cast as well. Err, and for the amateurs [...] I am in contact with quite a few of them and they're still kind of going, it was such an brilliant experience [...] and is giving us ideas.

This shows how the Pro-Am(B) process was innovative for both sectors and afforded the professional practitioners the chance to explore new ways of working.

I asked both organisations whether audiences of Pro-Am projects were coming back to see other professional work, as I had only heard some anecdotal examples. Neither organisation had data on this yet, but both were keen to know and would be looking into it. There were

figures however to suggest that the links to the SPTO(B) brand in Pro-Am(B) had increased audiences to the amateur shows dramatically.

The collective ownership and pride in the projects clearly belonged to the practitioners and facilitators as well as the participants:

Int23A: I think that benefits the organisation as well, because hopefully I've passed that benefit on, is to work and engage with people who are, you know, learning, doing something different. In some ways on a project like this you work much more collaboratively and much more equally than you might on other projects and for me that's hugely stimulating as well and makes me very enthusiastic and I think it raises the stakes of the outcome as well because you feel great ownership of a project [...]

The reward is the achievement and also it is to do with, you know, the world sitting up and noticing that these sort of projects are really important and valuable and that hopefully feeds into the whole idea that the arts are valuable and worth funding and worth maintaining for the next generation [...] make it epic in that way, I mean truly epic in the way that it tells important stories. [...] That are important to everyone involved and tell stories that can't be told in the way that, you can't necessarily tell in a conventional theatre.

There were clearly benefits from the Pro-Am projects which fed directly back into both SPTOs:

Int24B: So I suppose that for me is one of the really strong ones and then I mean otherwise I think it's kind of, new partnerships, new working relationships, so partnerships with the partner theatres round the country, people who work in those partner theatres, us getting to know them better, us getting to understand how they work and what the challenges are from their perspectives.

Balancing the process and product was identified as integral to both projects. This was best explained by 18A:

Int18A: That for us is the aim, is it's got to be both or it fails on one of the key pillars. But I'm not entirely sure, where I've reached is, I don't think it's binary. If the team is really at their best, the play doesn't get compromised by anything that we might need to change, it gets better.

What might the future hold?

Finally, I sought to understand what these innovative initiatives had inspired and what the future might hold.

Pro-Am(A) had become a permanent fixture and Pro-Am(B) was finite but lasted six years and made connections with the regional partner theatres and dozens of amateur theatre

companies. There was a consensus that working collaboratively with local communities was not only the duty of SPTOs, but also had significant benefits for the organisations:

***Int07A:** I think that education and community work is, should be central to every single organisation because it feeds and makes the professional work, that is the problem, I don't like saying this is professional this isn't professional, I don't like those terms but there's no better way of putting it.*

A Pro-Am(B) practitioner agreed:

***Int33B:** there is a truth to it such a truth to it [...] So err, in the bigger scheme of things I think [...] that there should be a production in every city in every corner of this kingdom [...] this idea of theatre, this arc of true theatre embracing the work of community, [SPTO(B)] have been doing it for a number of years already.*

This comment was echoed and expanded by Int38X:

***Int38X:** we shouldn't judge theatres by what it is that goes on on their main stages. It's absolutely everything that's going on, like an iceberg, beneath the water level that makes them really interesting, really worth cherishing and really worth fighting for their survival, and I think that's what we're really talking about, and I think rather belatedly that's what people have woken up to [...] it's not a question of losing professional standards, it's about understanding what the local community can bring to the theatre.*

Int08B felt that a significant product from Pro-Am(B) was that the boundaries were blurring between the professional and amateur sectors in terms of the distance between them, but that the future did not necessarily lie in amateurs and professionals sharing stages:

***Int08Bii:** I think they are [boundaries blurring] and I think probably that's not just us. I think not just theatre-making but there is a zeitgeist thing about that we value now, the homemade [...]*

I don't think the future of amateur and professional collaborations is a sort of loads of mixed plays where there are some amateurs and some professionals in them. Err just logistically that would be really difficult to do and hard to do and I don't think it would serve anyone particularly. [...] I think is about us working closer together and helping each other make each other's work and supporting each other, I think that's the future of doing it.

Contrastingly, a Pro-Am(B) practitioner endorsed the concept of the Pro-Am(A) model, in which local non-professional performers were included in professional casts because if this was done “appropriately, intelligently, professionally” it would “make the ground so much more fertile”.

Conversations were continuing at SPTO(B) about how the relationship with the amateur sector could be maintained. Ideas included sharing research on increasing diversity, or for SPTO(B) to commission a new play with large cast of older women as this demographic is the “backbone of amateur theatre” (Int08B), yet there are very few plays available for them.

5.3.3 Management of the space

‘Space’ was a recurrent term across the data. Examples of professional spaces which the participants inhabited included stages, theatre foyers (for communal lunches), rehearsal rooms, backstage, PIN code entry doors, and outdoor spaces for performances (McAuley, 2000). Both SPTOs opened up their buildings in new ways:

***Obs02A:** Environment - the room has a piano, high ceilings, lots of windows and feels like a lot of theatrical history has happened here. Good temperature. Visible theatre props on mezzanine level, a Roman type stone pillar, mirrored walls, large lighting rig, mixing desk. A totally professional setting. Muffled music from [matinee in theatre] downstairs on occasion. Part of the experience, not just any rehearsal space.*

An outcome of Pro-Am(A) was the fulfilment of the objective that the participants would form a relationship with the building. I observed the development of this relationship over the duration of the fieldwork, which seemed to grow stronger with each production, as the following extract from my observation of a production 4 rehearsal shows:

***Obs14A:** I arrive as instructed at the stage door and see a few late participants arrive, they all look very comfortable in the building, strolling in like I have seen staff do before, going through the "authorised access only" doors. This feels like their building. [Int19A] comes to find me, puts a headset in my hand and ushers me through a door and I find myself standing on the [SPTO(A)] stage! It is quite a thrill to walk across it actually. [Int19A] invites me to find a seat in the auditorium. Several calls have gone out on PA system for "all ladies and gentlemen of the [production 4] company to please make their way to the stage", just like a professional call. This is an example of what this project has created: ownership of the space, relationship with the building.*

SPTO(A) has a tradition of placing large photographs on the internal walls of the theatre featuring the cast of whichever play is on the main stage. When I saw a performance of production 4 (Obs15A) it was striking to see these photographs feature the participants. There was an atmosphere of excitement as some participants showed their friends and families the photographs and posed for pictures underneath them.

Everyone who took part in Pro-Am(A), including those who auditioned but were not part of a production, received the offer of free tickets for press nights of in-house professional shows:

Int19A: This is their building now you know they care and they come and they cheer and they watch the shows here and they feel like a little bit of the other shows that are on also belong to them now and they bring their families, because they have had that experience here. Because they've given their time.

It was evident that as well as creating the 'product' of four epic productions, which had been critically well-received and very popular with audiences, Pro-Am(A) had also generated the 'product', or outcome, of a meaningful relationship between the local people and their SPTO(A) building.

A Pro-Am(B) staff member responsible for running events explained how they approached having large numbers of participants in the building for the showcases:

Int22B: Any one off event is challenging compared to a long running performance, we often just treat [Pro-Am(B)] as being like a first preview where we know that all concerned are doing something very new and challenging for the first time (with lots of nerves and excitement) and try to work around this. The audience is mainly comprised of family and friends so we try to encourage that atmosphere throughout, whilst ensuring the venue and staff are still promoting high quality customer service.

I experienced this same approach in action at one of the partner theatres during a skills exchange weekend:

Obs04B: Arrival/first impressions - I arrive to see lots of people milling around in the foyer, a bustling and excited atmosphere. Two partner theatre staff wearing clearly labelled bright branded clothing open the doors for me (nice touch). Very welcoming. We are asked by PA system to all "enter space 1" (the main house). Introduction speeches – [Int08B] welcomes everyone then introduces the [Pro-Am(B)] project manager for the partner theatre who "will be looking after you for the next three years". Project manager tells participants to ask staff in purple T-shirts if they need anything. Welcoming the participants into the space.

A Pro-Am(A) participant stated that their newfound relationship with the building was cultivated by the accommodating attitude of the staff:

Int27A: if you're young and lucky enough to be based in [name of city] as a young aspiring actor or anything to do with theatre, you are lucky, because your theatre is there for you and that is very much how it feels when you are involved, it becomes your theatre [...] You don't have to struggle along thinking, I don't know what I'm doing here. I've never ever felt like that. It's always, yes, we just need to sort this out.

Pro-Am theatre can be a way of bringing people together through their shared values and sense of place. Int09X and Int10X said the one of the benefits of their participatory work was that “*the building*” felt more culturally rich and diverse. They did not refer to the organisation, only “*the building.*”

When I interviewed Pro-Am(A) participants in the SPTO(A) building they were constantly saying hello to staff who passed by. Another participant said the benefits they had got from the project were the craft and skills, and sharing time with people, “*being part of the beehive*”, and a sense of belonging “*here, going through that door*”. At this point they pointed to a ‘staff only’ door with PIN code entry. Int28A summed up the pride in the initiative which was shared by staff and participants:

Int28A: when we were doing [production 4], of course with the huge cast, and they are out rehearsing on [name of street] every night there is just this immense feeling of pride, err, and it's a wonderful thing. And I think, I mean [Pro-Am(A)] won't go anywhere, but if it was ever to go I think there would be a very large, err very obvious hole actually. I think it is really important.

Both Pro-Am initiatives focussed less on managing the participants in the space and more about inviting the participants into the space, hosting them, sharing and collaborating. Two interviewees went as far as to say that large-scale participation initiatives should and indeed would be part of the future work of all funded theatres and that in order to house everyone that wants to take part, with one stating: “*after a little while they'll realise that the walls are in the wrong place to do this. They will have to move the walls*”.

5.3.4 Marketing

As stated in section 5.2, marketing can also be considered as a risk in this context. Both organisations were aware of the challenge of not only creating but marketing the risk-taking Pro-Am initiatives to participants, and productions to audiences.

I asked for more information about why and how SPTO(A) had taken the idea out into the local community. Int05A explained how the strategy was developing:

Int05Ai: I think people appreciate having a face behind an email. [...] So it is all about different ways of advertising as well, [...] it is in the form of a workshop so it is much more relaxed and people can come in and have fun with it. And I think because it is so integral to the learning department, you know if people didn't make it through to this performance, you know they would come back and see it and we will create a link there which would encourage people to come back.

So I don't think it is about auditioning people and then saying no and then not having anything else to do with them. I think we are creating these links because we want to keep these links, and maintain them. You know, keep people coming back, keep an interest there and encourage that.

The project was also advertised in the season brochure and on the website, plus a mailout was sent to people on the SPTO(A) database. Sending this email created what Int04A called a "memory peg" so that if participants were not available for the current production it would show them that the offer of engaging in the initiative's activities was long-term.

A senior figure at SPTO(A) explained how Pro-Am(A) strengthened the organisation's brand and aligned with core values:

Int16A: I think that there's a couple of things erm that it does. So I think that from a media point of view [the artistic director] directing it, being on the front of the brochure erm us, us actually having a press night that is erm in the Society of London Theatre diary, [...] I think that that is helping to support our message about how we are a theatre of national significance with a very strong focus on our local area and our community and I think that's, I think it's very important for us to be seen as an organisation that is producing bold and ambitious work that is inclusive.

The free tickets given to participants for press nights kept the conversation going, encouraged peer to peer marketing and valued participants, whilst also filling the auditorium for an important performance, benefitting the organisation.

SPTO(A) experimented with short promotional films of Pro-Am(A) rehearsals and productions, but found they were not as effective they had hoped because the impact of the liveness could not be captured, which shows the challenges of marketing live theatre, as highlighted in the theory by Walmsley (2014b). There were too many people in the space, which looked "messy". Pro-Am(B) made better use of short videos to promote the project, which were published on the SPTO(B) website.

Given its success to date, I asked if SPTO(A) had considered developing Pro-Am(A) as its own brand and creating a specific logo for Pro-Am(A)'s productions. However, Int16A stated it had been decided that this would in fact delineate the Pro-Am(A) work from the rest of the artistic output of the organisation:

Int16A: if you go, this is a [Pro-Am(A)] production, then you are distinguishing it as something separate. It's just about making sure it is properly rooted in our brand, our values so, so would we, would we have a different logo? I don't know, I

don't know that we would. I think there's more potential for us to make more of [Pro-Am(A)]. There's more potential for us to make more of learning full stop, and the next stage for [SPTO(A)] is to do that because that work is the most fundable, is the most interesting work for individuals and for trusts and foundations [...] I think there's a story to be told.

The organisation's commitment to the concept was evident in the approach to marketing.

There were plans to develop the marketing strategy of Pro-Am(A) to audiences:

Int16A: *I don't think our general audience, like you know the 388,000 people who are coming to the theatres every year, I don't think that a proportion of those who know about [Pro-Am(A)], [...] and I don't think there's a large proportion of the audience who realise how much work we do with erm people in the community.*

Int16A explained how SPTO(A) had streamlined the organisation's participation provision. While the leaders and senior managers had always sought to be ambitious and expansive in their offerings, they felt that were perhaps trying to do too much by offering a wide spectrum of projects. So they decided to focus on what they were experts in, which was the process of theatre-making and the skills involved. Pro-Am(A) was central to this vision. This correlates with the objectives of Pro-Am(B). Although SPTO(A) did not explicitly state the objective to 'share' and 'exchange' skills when advertising the project, it is a commonality. "Refining the message" (Int16A) of what the learning department could offer was more successful than trying to communicate all the previous offerings to participants. The strategic decision was therefore made to offer a more refined programme:

Int16A: *that's played out better with audiences in terms of take up [...] it was quite demoralising to be doing a project that no-one signed up for and it was really just because there was too much of it and there wasn't the resource to invest in marketing all those different products on top of all the work we also do being an organisation with three venues. Whereas now there is less of it it's more linked to the work that we do as [SPTO(A)] anyway and it's more linked to the work on stage.*

This shows a significant strategic decision to integrate Pro-Am(A) into the organisation and align its marketing with the other artistic output. I observed that this approach was already having an impact:

Obs11A: *Amazed to see [SPTO(A)] practically full. I sit next to an elderly lady who when I ask says she doesn't know anyone in the cast, she tells me they are all local people. I asked if she comes to see much here and she says yes. She was attracted to this show by the title and was interested to see the local aspect and what it would be about. She remembered seeing a play here a few years ago with amateurs on stage with professionals, said she had no problem with it. Said she saw [a professional production here recently] and didn't like it so hoped this would be*

better! I also heard a couple of ladies behind me who came based on hearing about it on the radio. I saw [SPTO(A)] tweeting about local radio appearances promoting the production.

The SPTO(B) brand was at the heart of Pro-Am(B). The brand association between SPTO(B) and the amateur companies was very powerful in recruiting new participants, as well as audiences:

***Int37B:** Obviously carrying the logo and performing at [SPTO(B)] has been a great marketing plus and it lifted our profile. We are the only [name of locality] group who have [taken part in Pro-Am(B)]. We have had good local coverage, press, radio and local TV and good audiences because of it. As a director it has helped my credibility too of course having been mentored by them. [...] we held two workshops as introductions to Shakespeare and had a birthday party for Shakespeare on 23rd April 2014 to promote the auditions – with birthday cake.*

Unlike Pro-Am(A), Pro-Am(B) had its own logo, which combined the name of SPTO(B) and the name of the project. This was an important part of the marketing strategy for both participants and audiences. For participants, it was a way to share the cultural value of the SPTO(B) brand. This relied on a consensus of that value amongst participants, which I found to be the case. For audiences, it showed that whilst SPTO(B) was celebrating amateur work, the productions created within the Pro-Am(B) project were not produced by SPTO(B).

***Int08Bii:** For the regional partners they will send it on a mailout to all their people who usually come to see their shows and things like that. [...] always clearly going, this is an amateur show based on extracts. Once you describe what it is, because what we don't want is anybody sort of tricked in there [...] So it is actually the celebration of a project.*

Some people did local showcases here. And especially here there are some people who just love their Shakespeare, know [SPTO(B)] quite well either they see everything that came along in kind of a completist way, and [...] they go oh this is really interesting [...] Another kind of audience member might be someone who just loves Shakespeare. Comes along to see all those extracts like a Shakespeare's greatest hits. And they are quite academic actually [...] But most people have a connection to the shows.

The value of branding extended beyond that of the SPTOs. The logo of the CTF was also on documents relating to both projects, which highlighted the organisations' credentials for outreach work. The nationwide links with the two flagship organisations through Pro-Am(A) and Pro-Am(B) was arguably also valuable to the CTF.

One interviewee from the amateur sector suggested that audience development may be a motivating factor for Pro-Am(B), as a way for SPTO(B) to distribute their brand all over the country:

Int34B: audience development, it's got to be. Because inevitably err although they are a hugely successful commercial brand it's got to be good for [SPTO(B)] to be able to [...] keep their brand and their work, not just Shakespeare but the other work they do as well, very much at the forefront of people's minds.

A senior figure at SPTO(B) did confirm that Pro-Am(B) had increased the organisation's reach across the country. However, rather than promoting the SPTO(B) brand, the benefits of the project had been the opportunity to build new partnerships for the organisation and to use the brand to promote the amateur work taking place across the UK.

Int24B: one of the absolute strengths has been the publicity that the project's got, the fact that those really local stories in lots of different parts of the UK, it's been great to kind of get that recognition, and for it to be quite visible as a project. It's great for us as well that it's UK wide rather than just England wide, so quite because of our Arts Council England funding we're England wide, or international, but for this to actually be UK wide I think has been really good for us.

This comment about the 'visibility' of the project also resonates with the observation I made at all of the Pro-Am(A) productions, which is that the productions could be viewed as and marketed as events. The epic shows with their large casts and innovative approach to staging and design publicised the projects to future participants and audiences. This was particularly evident in production 4, which was partly staged in the streets outside SPTO(A) and attracted lots of interest from passers-by.

5.3.5 Summary

This section has examined some of the innovative practices of large-scale participation initiatives and the ways in which the SPTOs are developing new models of theatre-making through Pro-Am(A) and Pro-Am(B).

In both cases the emphasis was more on sharing skills than talent-seeking. The ensemble dynamic was actively cultivated in both projects, with participants being encouraged to work together. The project leaders and facilitators placed a strong emphasis on balancing a rigorous process, discipline and professional expectations with a warm, welcoming atmosphere. Participants responded to this approach, confirming the importance of offering as close to a professional experience as possible, whilst also preparing to be adaptable when necessary.

Auditions, followed by workshops, followed by rehearsals is a valuable model. Workshops teach skills, give participants the chance to learn about the production and decide if they want to commit, allow everyone to get to know each other, and help creative teams to designate roles. Timing the projects and pacing the process effectively also helps to keep participants engaged. Therefore detailed planning is imperative.

As previously stated, giving participants ownership of the work is vital and this is achieved through the creative process, where building confidence and mutual trust is key. Language and vocabulary played a role in this, with practitioners finding new ways to explain professional practice and expectations to participants with limited theatrical experience.

In the context of large-scale Pro-Am theatre in SPTOs, a 'product' can mean a production, a project, or an outcome from a project. High quality production values for Pro-Am productions are integral to the participants' motivation and audience experience. This can be complex with large casts. The process was where most of the benefits of the projects were identified by interviewees, but the product should not be overlooked. Participants were galvanised and enjoyed the rigours of the process because they were preparing for the impending production.

The term 'space' can have many meanings, such as the stage, the SPTO building, an outdoor performance location or a rehearsal room, and was an integral part of the Pro-Am experience for participants. The findings showed that it is less about managing the participants within the space and more about inviting them into the space, hosting them, sharing skills, and collaborating.

Successful participation initiatives can strengthen the brands of SPTOs, but large-scale Pro-Am initiatives present marketing challenges and opportunities, especially as they have to be offered to participants and audiences. The sharing of the SPTO(B) logo with the amateur companies was a particularly valuable aspect of Pro-Am(B). Highlighting the spectacle of large-scale productions, such as Pro-Am(A) production 4, and viewing them as events can be an effective marketing tool for future productions.

As well as innovations in creative practice, the study has found that the initiatives also instigated changes in management practice. Both case studies showed evidence of 'in-reach'

as well as outreach, with interviewees saying they had become better at their jobs through their involvement in the initiatives and developing new, improved ways of working.

This completes the findings chapter. I have summarised the main arguments from each theme to take forward. The key points which have emerged from the data will now be explicated, and the study concluded.

6 Discussion

The originality of this PhD research lies in the exploration of the organisational implications of a particular phenomenon of contemporary British theatre. The theoretical framework comprises the three pillars of leadership, risk and innovation, and the two case studies have been used as examples to investigate how these themes play out in practice. The key points from each findings section have been assimilated and the significant points for discussion have emerged.

This chapter consolidates my scholarly contribution to the two fields which underpin this interdisciplinary PhD research. The study contributes primarily to arts management studies, by explaining why and how SPTOs develop large-scale participation initiatives, given the internal and external challenges; and secondarily to performance studies, with a developed understanding of the concept of Pro-Am theatre. Each section of the chapter explores key points, reflects back on the literature, and **highlights** the significant findings to have emerged from my research.

Given the iterative approach taken throughout the study (Tracy, 2013) whereby I revisited the literature during the data collection and analysis, the findings will be considered in relation to the literature review, and any new literature which relates to unexpected findings will be introduced.

6.1 Contribution to arts management studies

This section begins by explaining the most significant contribution, which is that this empirical study, as far as I am aware, is the first of its kind to explore the introduction of large-scale participation initiatives into SPTOs from an organisational perspective. I have explored the case study initiatives through the lens of the leadership, risk and innovation framework in order to benchmark best practice and document the challenges and opportunities. Therefore the next three sections present the discussion points and contributions to knowledge within each central theme.

6.1.1 Large-scale participation initiatives in SPTOs: An organisational perspective

The most significant gap in knowledge highlighted in the literature review is the lack of theory on large-scale participation initiatives within funded theatre organisations. They are happening in the field, both in terms of creating theatre with large numbers of individual local

participants (Pro-Am(A)) and through the development of national connections with the thriving amateur theatre sector (Pro-Am(B)). These initiatives are affecting some of Britain's biggest theatre organisations, yet are under-represented in the academic literature. This thesis has presented an authoritative exploration of the phenomenon.

Through this study I have:

- Been granted extensive access to the projects and cognitive access to what the people involved in the projects thought about them.
- Followed the projects developing in real-time.
- Considered the similarities and differences between the two case study models.
- Explored the managerial challenges and organisational implications.
- Observed existing models of amateur and professional theatre-making being transformed.

Klaic's (2012) otherwise comprehensive description of the groups of people that performing arts leaders interact with omits participation, or any reference to the public. This should be added to the definition of the complexities of artistic leadership. Leaders of SPTOs must not only build relationships with the public as audiences, but with those who want to engage with the organisation through inclusion in the theatre-making process.

Troilo (2015) suggests, and several interviewees also believed, that the demand for participation is only going to increase. This, coupled with the fact that both case study projects were deemed an overall success by the organisations and participants, led me to question why more organisations did not offer these types of initiatives. This presents a conundrum for the future. Other organisations may see the benefits but underestimate the challenges. Perhaps a cultural policy intervention is in order, whereby building-based funded theatre organisations would be obliged to offer the kinds of initiatives I have studied. For example, using the Pro-Am(A) and Pro-Am(B) models, this could be in the form of one large-scale production per year on an SPTO's main stage with a cast of local participants, or a project which connects with local amateur theatre-makers. This implies that a broader debate about this work is required, to which this study contributes.

The objectives of 'excellence' and 'access' stipulated by the "Achieving great art for everyone" ACE framework (2010) are fulfilled by these models, if they are executed well. Therefore perhaps Pro-Am projects in SPTOs can be viewed as an investment in the future of the UK arts ecology, and funding requirements should be amended to reflect the potential legacy of these initiatives in order to encourage more of them. Some interviewees welcomed the idea of a policy intervention, others were more cautious. As one interviewee put it, if an organisation is receiving public money it must ensure it is providing a public service to justify how the public pound is spent, and *"how we can best get under the skin of the customer relationship"*. Another interviewee stated that funding requirements can trigger step changes in the system, which would be required, given that both case study projects were supported by a charitable trust. So perhaps a prescriptive policy would see many more participants and organisations benefiting from these kinds of initiatives. They arguably also prompt further debate on the role of philanthropy in the future of the UK arts ecology.

The success of Pro-Am(A) and Pro-Am(B) is prompting discussion amongst cultural policy-makers and funders, but it is too early to tell if prescriptive policy will be introduced. I saw some exciting and innovative work being created, and spoke to leaders, facilitators and practitioners who had learnt a great deal and been very positively affected by the initiatives. However, the data shows two main concerns about a policy intervention. First, this work is complicated and requires careful planning, a strong infrastructure and highly skilled and experienced practitioners. If SPTOs are obliged to create large-scale participation initiatives which are not supported by leaders, are under-resourced, or lack the necessary expertise, this could damage the reputations of organisations. Participants must be supported throughout the large-scale Pro-Am process, and prescriptive policy might also lead to unsatisfactory experiences for participants, and, poor productions. Second, as well as providing participation opportunities, the work should be artistically driven, and one interviewee argued that policy should not dictate the artistic choices of SPTOs. As Bilton (2015) explains, imposing new policies can be disruptive for arts organisations, which need time to incrementally develop new initiatives and make sure they are properly resourced.

Furthermore, the Pro-Am(A) model lends itself to public support more than the Pro-Am(B) model. Removing barriers to participation is seen as positive, but there could be concerns about public money being used to facilitate amateur participation, which has always existed

outside the remit of public funding and cultural policy. Another side of this debate is that some amateur theatre companies may not want to be part of a prescriptive policy initiative and may prefer to maintain their autonomy. Part of the success of Pro-Am(B) is that it was based on an 'offer' to amateur companies and so if SPTOs are obliged to forge connections with their local amateur scene this would set a different tone. Given the success of both initiatives, there should be a wider conversation about the opportunities and challenges for organisations and participants, which this PhD thesis and my future academic output can offer.

6.1.2 Leadership: Discussion points

One of the recurring questions I posed across the interviews was the extent to which ambitious initiatives like Pro-Am theatre are down to acts of individual artistic leadership. As one interviewee put it, "*one hundred percent*". This was a common opinion. In both case studies the idea for the Pro-Am project was conceived by the artistic director of the SPTO. Even if the impetus does not come from the top, there must be support and investment in the concept from across the organisation, so a supportive leader who will commit the necessary resources is imperative.

A common observation which struck me about all the leaders and senior managers I spoke to was their clarity of thought and considered responses. This takes nothing away from the interviewees who held different types of roles, but those interviews were generally more open and chatty. The more senior figures wanted to understand exactly what I wanted to know from them. They asked for a clear agenda for the conversation, occasionally took long pauses to formulate a response before speaking, and often gave examples or used analogies to illustrate a particular point. Perhaps this considered compartmentalising, both of their available time and their thoughts, comes from being very busy people in senior positions, or is a prerequisite skill for holding such a position, but it was striking nonetheless.

Positive turbulence (Gryskiewicz, 2009) was particularly evident in Pro-Am(B), but less so with Pro-Am(A). This is because SPTO(B) had such an ambitious objective, to build a bridge between two sectors. Both SPTOs prospered from the disruption of introducing the Pro-Am projects (Arvonen, 2009). This is something that more SPTOs will face if increasing numbers of people wish to participate in the arts and engage with their local theatre organisations.

The value of intrinsic artistic experience (Antrobus, 2011) and of understanding the core product is clearly vital when running SPTOs and creating Pro-Am projects. However, it is also important to understand that plays are not the only output and that having specialists in the field of learning and other areas is vital for success.

The dual leadership model reflects Corry's (1961) assertion of theatre as a complex fusion of arts, with the artistic director spearheading the creative vision for the organisation and the chief executive as an enabler, who recognises the contribution of all areas of the organisation to achieving the mission and vision. I could see the "divergent rationalities" (Landry, 2011, p.48) of the artistic and business sides of the organisation at play, but sensed no tension. Although the artistic directors of both case study organisations had the initial vision for the initiatives and were credited inside and outside the organisations for their success, the roles of the chief executives were integral. They supported the concept, enabled the vision to be realised and committed to the development and expansion of the initial idea. This is contrary to Lapierre's (2001) assertion that the roles of managers are subordinate to those of artists in arts organisations. The power of the dual leadership model lies in balancing the pursuit of artistic excellence with the viability of the organisation. Therefore, support from both leaders was integral to the successful introduction of the case study initiatives.

Formal and informal leadership styles were also evident (Byrnes, 2015). Both of these emerged gradually. The formal roles were created as each SPTO developed strategies to make the Pro-Am initiatives run more effectively, by designating roles to staff members. The informal leadership or emergent leadership (Pescosolido, 2002) contributed to the success of both case study projects because the 'extra-curricular' rehearsals improved productions and the administrative activities helped the projects run more smoothly. The scale of the initiatives suggests that formal and informal examples of leadership are imperative. The organisations cannot always account for informal leadership, so relying on it to emerge is a risk.

The ensemble approach was evident in both the Pro-Am projects, and also more broadly in an organisational behaviour context, which evokes Mintzberg's (2009) theory of organisations as communities with the leader(s) giving direction, goals and focus, then enabling staff to deliver a mission everyone is invested in. This clearly has benefits in a large theatre organisation, and evokes Cohen's (2011) theory of the leader as vertical glue but in a broad

system that gives everyone scope for input. Schiuma's (2011) theory on organisations as living organisms is also relevant, in the way an ensemble approach and open organisational culture can harness the emotive and energetic characteristics of the organisation, much as a director does with actors in a rehearsal room. However, an ensemble approach to working still requires clear decision-making and leadership, otherwise there is the danger of prolonged discussion without a decisive strategy being in place. Another potential problem is that a managerial approach which empowers and includes everyone can lead to a situation where there is such overwhelming positivity for the system that anyone who has a grievance or a problem does not share it for fear of this being seen as criticism of the system. Changes in leadership can be destabilising, so the project needs to be embedded. SPTOs should have structures in place to protect or evaluate projects when leaders change.

Leading from the centre. This study explores leadership within a new context, and adds to the discussion on charismatic leadership within the arts (Nisbett and Walmsley, 2016). There were examples of charismatic leadership in both case studies, in the way that leaders were described as 'arteries' through a project or having a 'powerful spirit' within the organisation, but this does not necessarily mean that it is a requisite element for success. No one used the word 'charisma' when describing leaders and there was no sense of fandom, although strong personalities were evident. But leaders do need to inspire members of the organisation to support the introduction of Pro-Am initiatives, and inspire the participants to become involved and commit to the process. There is the potential for tension when charismatic leaders collaborate (Bilton, 2007), for example when the artistic director of a project and the practitioner who works with the participants have different creative visions. There is a mutual need to trust each other, build a relationship, protect the participants' experience and be prepared to adapt working practices.

Elements of charismatic, transactional, and participatory leadership (Cray et al, 2007) were evident in the actions of Int06A. Int06A and Int08B's enthusiasm was viewed as integral to the successful introduction and development of the Pro-Am projects. Int18A's method of working collaboratively and providing resources to achieve a goal also suggests a form of transactional leadership, although there was no pre-occupation with rules and standards as suggested in the literature. Transformational leadership (Cray et al, 2007) was evident in the introduction of Pro-Am(B) by the former artistic director of SPTO(B).

The theory could also be extended to account for leadership models in amateur theatre. This could be classed as participatory leadership (Cray et al, 2007) because leaders are usually voluntary and are also active members of the group. They take into account the opinions of others in the group and work collaboratively. The appointed leader usually steps down and returns to regular membership after a fixed term and another member takes over.

Although elements of Cray et al's (2007) four leadership styles were evident, I saw a style of leadership emerge which was not covered by this framework and which extends the theory on charismatic leadership. I have called this 'keystone leadership'.

Keystone leadership. This is a new style of leadership in arts management. It could be applied to a director, project manager, head of department (such as fundraising or marketing and communications) or the head of the organisation. In architecture, a keystone is the stone which is positioned at the centre of an arch shaped structure, holding it together. I chose this term because a keystone leader is a custodian, holds responsibility but values input, enables risk-taking, provides access to resources, and is a continual, supportive presence, even when not physically present. If a project is embedded in the organisation well enough and everyone knows their role in it, a new leader should be able to understand their keystone role and pick it up without too much disruption. A common finding was leaders who 'do' rather than just 'say', and whose actions inspire people to follow them and feel invested in the mission and vision of the organisation or initiative. These leaders are outstanding communicators who provide an environment in which staff and participants feel empowered to take risks and learn new skills, whilst supported by a stable structure. The literature does not cover this particular leadership style, which was evident in my research and I believe is intrinsic to the introduction of successful large-scale participation initiatives.

Nisbett and Walmsley (2016) argue that the phenomenon of charismatic leadership should be understood in context. Keystone leadership is particularly evident in the context of launching a significant new initiative which will have a ripple effect across the organisation and requires the input of several departments. The theory describes leaders who see the 'whole tapestry', take a holistic approach, and consider how the introduction of the initiative will affect all stakeholders.

In terms of 'followers' the concept of keystone leadership is supported by Antonakis et al's (2011) theory on charismatic leaders being able to "federate collective action around a vision" (p.376). Charisma is a problematic term because it could be inherent to the individual (Weber, 1968), taught or created through the leader-follower relationship. I agree with Howell and Shamir (2005) that there is a need to focus on the followers as well. The initiatives needed the participants and collective action of the staff within the organisations to succeed. However, the findings did show examples of the personality traits of leaders being integral to the launching of the projects or productions, mostly in terms of what I would describe as infectious enthusiasm for the vision. So I did consider the leader-follower relationship, but followership was not a key concept and would require further investigation.

Rationale and positioning are key. The project-based nature of theatre can put pressure on strategic decisions, as the failure of a single project or production can reflect badly on the organisation, so decisions have to be taken carefully. Mintzberg's (1987) theory of strategy as position is relevant, given that both organisations claimed connections with local communities. The philosophy of both initiatives came from a conscious approach to not be academic and educational institutions, 'telling' people how to make art, but to use the expertise within the organisations to create theatre, and to share this speciality with as many people in as many ways as possible.

A recurring observation was the fractious state of the relationship between pre-existing amateur groups and regional theatres based purely on hiring spaces, which had reached stalemate over the years. SPTOs had established credentials of outreach work dedicated to removing barriers to participation and encouraging people with no previous experience to take part in theatre-making and enjoy the benefits. But they had not engaged specifically with those with a pre-existing passion for drama. The aim of SPTO(B) was less about teaching the amateurs how to emulate the professionals and more about facilitating a reciprocal sharing of skills and best practice, to change attitudes towards amateur practice and to recognise its contribution to theatre in the UK. The word 'learning' occurred frequently across the data, from all types of stakeholders, and on both sides of the Pro-Am relationship.

Although both case study initiatives engaged with people with a pre-existing passion for theatre, both did also try to broaden, deepen and intensify participation opportunities (McCarthy and Jinnett, 2001). The rationale for Pro-Am(B) resonates with Lowerson's (2005)

theory on the fractious synergy between the amateur and professional sectors and was something SPTO(B) sought to address. If Pro-Am work is about making theatre which is inclusive and brings people of different theatrical backgrounds together, then this study has found it to be very successful. It may be that Pro-Am is subverting traditional theatre-making structures. Or it may in fact be maintaining a hegemonic structure, with the professionals deciding who can take part (Jancovich, 2011). In my view, the professional creative teams do have to moderate who can take part, but this is based principally on the numbers of people they can accommodate and the participants committing to the process.

A holistic approach to outreach work. Large-scale participation initiatives can have profound organisational implications. Both case study SPTOs had seen an organisational change, whereby the learning department had become far more integrated, no longer operating as an ‘annexe’ or ‘silo’, and the work of these departments had in many ways been given parity with the professional work. This was particularly evident in Pro-Am(A), where staff members from each department spoke of an overall change in the appreciation and understanding of SPTO(A)’s commitment to outreach work.

Flagship organisations can be cultural shapers as well as responders. The dictionary definition of ‘flagship’ is, “a single item from a related group considered as the most important, often in establishing in a public image” (Collins English Dictionary, 1994, p.584). In this study flagship is taken to mean renowned organisations whose strong brand and cultural value gives them a platform for sharing new models of practice. This is barely covered in the literature but it is valuable to consider how these organisations can shine a spotlight on new models of participation and their internal benefits, as well as benefits for the participants. Both case study initiatives generated interest within theatre industry publications. Both used their brands to establish the initiatives, but in the case of SPTO(B) this was a particularly powerful aspect of opening up the conversation about the value of amateur participation to theatre in the UK. It was even described by the organisation as a “*leadership project*” in its ambition to lead a change in the relationship between amateur and professional theatre-makers.

Whilst I am not suggesting that SPTO(A) and SPTO(B) should have status as the most important SPTOs in the country, which could devalue the position of other organisations, this definition is useful in understanding that these organisations have prominence and as such

can be agents for change. This influence is a particularly evident gap in the literature. These nationally and internationally renowned, publicly accountable organisations can broaden the conversation on large-scale participation work and on the potential for national and regional SPTOs to have more prominent roles as civic centres (Kolb, 2013) and ‘hubs’ of arts engagement across the UK.

Pro-Am(B) was described by SPTO(B) as a “*leadership project*” when it began. The rationale was to lead a step change in the relationship between the two sectors. The leaders recognised SPTO(B)’s position as a flagship organisation. The SPTO(A) leaders did not set out to do this, but they are also pioneers. I could not find another model which existed in exactly the same way at another regional theatre.

Landry (2011) states that arts organisations can be drivers for change, but does not say how. I believe these organisations can be drivers for change and cultural shapers as well as responders in their offering of large-scale Pro-Am opportunities. As one leader put it: “*cross the boundaries of how you behave and it will just happen*”.

One interviewee stated that more people would demonstrate against the closing of the local library or museum than they would their local theatre and that flagship organisations have a role in changing that. Pro-Am work can definitely be part of the catalyst for change, and of developing a trend of “*touching theatre*” in new ways.

Pro-Am(B) was an intervention in the amateur theatre sector and the traditional models of practice. “*Acknowledgement*” was a key word used by the amateurs. There was the risk that SPTO(B)’s national lofty flagship status could have been a hindrance, with amateurs not wanting to be dictated to. However, there was mutual respect and a recognition of the bodies of knowledge on each side which could be valuable to the other.

Without explicitly focusing on it, it became apparent through the data that the challenge of succession is something SPTOs and policy-makers need to think about. If instigating bold new initiatives is down to individual acts of leadership, what happens when there is a change at the top? It is clearly important to embed the concept into the fabric of the organisation and to give staff ownership of the project, as well as participants.

Training arts leaders of the future seems highly valuable, especially for buildings-based organisations like ST and SPTO(B). Trainee artistic director programmes in funded organisations such as the one piloted by SPTO(A) could be a worthwhile prescriptive policy stipulation in the future, especially given that leaders need an awareness of the civic role of the organisation, but also the inner workings of the building and all the spaces within it.

6.1.3 Risk: Discussion points

Large-scale Pro-Am work definitely emerged as a strategic opportunity rather than a threat, but this was dependent on the approach to the associated risks.

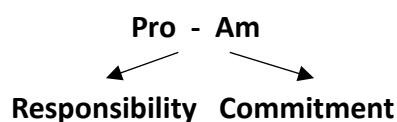
Both case study initiatives took artistic risks with the types of productions created and were risk-aware but not risk-averse. An SPTO needs to be very clear why they are taking the artistic risk of diversifying from their core output of creating professional plays. Both offered not only traditional plays but epic, original plays, or original approaches to well-known plays. As Gardner (2015) puts it, both projects spoke about “the way we live”. It could also be argued there is risk in safety. Palmer (2003) states there is pressure on organisations to keep innovating, but I refute Palmer’s (2003) claim that critics only reward success and not risk and ambition, because the concepts of both projects were well-received within industry publications.

New work was part of both projects, and integral to Pro-Am(A). This had associated reputational risks, but the innovative productions were well-received by audiences. In Pro-Am(B)’s case, there was a reputational risk in the fact that the productions were directed by members of the amateur companies and not the Pro-Am(B) practitioners, yet the SPTO(B) brand was on the marketing material and programmes for these productions.

Although both projects created exciting opportunities for non-professional theatre-makers, the professional position should be protected. There is a strategic and reputational risk to SPTOs of not valuing professional performers. However, as the data shows, rather than cause displacement, both case study projects created opportunities for professional performers and practitioners. There are also opportunities for professional writers who do not often get the chance to write for large casts, given the financial restrictions in the professional sector. For example, a play involving 150 professional actors is unlikely to generate profit and therefore ever be produced.

Collaboration and co-production can occur at several levels in Pro-Am work, which can be risky, creating tensions within the organisation, between the organisation and external collaborators, and between participants. If well-managed however, the creative possibilities of large-scale Pro-Am work are endless.

Artistic risk – responsibility lies with the ‘Pros’ in the Pro-Am model. As Nicholson (2002) suggests, the trust between professional practitioners and non-professional participants goes both ways. White’s (2013) theory of protecting participants into involvement through lower risk activities and building it up steadily was evident in both cases. The fact that so many of the practitioners stated that the talent and ability of the participants was not important for successful productions showed that the ability of the creative team was vital. A clear creative vision is imperative, along with a safe, nurturing environment for participants, all within a structure which has flexibility for theatre-making practice to be adapted.



The responsibility for mitigating artistic risk and creating a high quality production lies with the creative team, or the ‘pros’ in the Pro-Am model. If the participants, the ‘ams’, commit to the process then the professional practitioners and facilitators will do the rest.

Valuing participants’ investment. The risk undertaken by the participants is a composite of time, emotional investment, and public performance. Valuing participants’ time raises the thorny question of payment, and whether audiences should pay to see amateurs who are not paid to be part of the show. I did not discuss this with participants because it did not relate to the research objectives and it felt inappropriate to ask participants who recalled their experiences so positively during interviews, whether they felt they deserve to be paid. Paying participants would change the ‘offer’ and the rationale of the initiatives, and both SPTOs subsidised the CTF funding for the projects and did not profit from them. Additionally, it is a common factor of theatre-going that ticket revenue covers costs beyond the payment of actors. However, this could be a concern for SPTOs in the future. Continued communication with ACE, Equity, and all stakeholders will be necessary.

A strategy should be in place for the projects' legacy. This can counter the sense of 'bereavement' (Cochrane, 2001) after the event for participants who might have been deeply affected by the theatre-making process or particularly engaged with the group intimacy of the collective nature of theatre. This is inevitable to a certain extent because it is the nature of theatre. This was more evident in the Pro-Am(A) case study because the Pro-Am(B) model engaged with amateur companies who would continue afterwards, but there was still a sense of responsibility to maintain links. SPTO(A) tried to alleviate this with year round programmes of work.

Creating a mechanism for pastoral care. Pastoral care is vital. Mshengu-Kavanagh (1997) speaks of the responsibilities of 'people's theatre' but we need to go further. Organisations must be sensitive to the needs of all generations in the intergenerational framework. It is important to recognise individual needs: 'participants' or 'amateurs' are not homogenous. If a mechanism is in place, then there is flexibility to deal with unforeseen circumstances. This also allows the theatres to be more experimental and ambitious in their artistic choices. **When individuals are valued in large numbers, Pro-Am theatre is powerful.**

Balancing the logistic with the artistic. The motivation for the work should be artistic and the next decision for the SPTOs is how many people they can engage with. Detailed planning is crucial. However, some interviewees highlighted the importance of the trust amongst the creative team to stick to those plans. Paradoxically, others spoke of the need for flexibility in the process. Both approaches suggest that experienced and skilled professionals are needed.

Embracing the chaos. This is integral to a creative process involving dozens of participants, whether as one large cast, or in several concurrent productions. The 'micro discoveries' (Eisner, 2002) and pursuit of surprise is a risk but is also often a motivator for professional practitioners and participants alike. Risk should be recognised, kept close and absorbed, not avoided.

Both case study initiatives were logistically extremely challenging, but cleverly gave everyone ownership. As one interviewee stated: "*everyone is vital*". I did not find the case study Pro-Am initiatives to be a form of 'creative labour', with the professionals holding the power, showing the amateurs the standard to aim for.

Resource management and demand uncertainty. SPTOs must address the complexities of dividing resources between the two strands of its brand narrative, the professional shows and the outreach work. This is especially difficult as participant numbers are unpredictable, although both case study projects proved so popular that organisers knew they would get as many people as they decided to accommodate.

Some interviewees saw a cynical motivation for large-scale initiatives, in increasing ticket revenue and audiences through friends and families of participants. There is no evidence yet that these people returned to see other productions. The ticket price point arguably has financial and reputational risk. Pricing the Pro-Am productions on the SPTO stages in line with those in the organisations' smaller venues is an effective strategy as it signals an expectation of quality to audiences.

Whilst I agree on the need for arts organisations to embrace risk and increase activity in times of financial constraint, it is hard to 'do more with less' (Wadson, 2013). Large-scale Pro-Am projects are expensive, and there is a risk of 'mission creep' depending on where funding comes from, although this was avoided by both SPTOs. Having been so ambitious, the case study organisations may now face pressure to keep innovating, which will be a challenge given that the CTF funding period for both is at an end.

Funded organisations are expected to create outreach opportunities which remove barriers to participation and engage people, but an SPTO making a definitive declaration to collaborate with autonomous amateur companies who are already involved in theatre-making is a reputational risk. Amateur theatre has always existed outside the remit of cultural policy and funding, and if more SPTOs engage with amateur companies rather than introducing new people to the benefits of theatre-making, there could be an adverse reaction amongst funders. However, there could also be reputational risk to our established publicly funded theatre organisations if they do not recognise the pre-existing passion for theatre in their local communities and open their doors and their stages to them. Pro-Am models like the ones I have studied can address the paradox of engaging new people and also working with members of the public who already have a passion for theatre, which can benefit Britain's theatre ecology (Neelands et al, 2015).

Scale is the most influential risk factor– this is mitigated by infrastructure and the right people in the right places. Large-scale Pro-Am theatre requires experienced and skilled practitioners and facilitators. The plethora of skills and techniques, and seemingly endless patience and energy shown by the people responsible for offering Pro-Am work are some of the things that struck me the most.

Both SPTOs showed a great deal of pride in their Pro-Am projects, which featured heavily in the organisations' annual reports. Both also utilised the success of the Pro-Am projects to enhance their reputations through local and national press coverage. Unsuccessful projects could be damaging to SPTOs' reputations if, for example, a hundred participants spoke of an unsatisfactory experience. The initiatives are at risk if all departments of the organisation are not clear about the objectives or engaged in the concept, because this detaches them from the rest of the artistic output. The key is in the embedding.

The scale of the projects and productions affects practitioners' methods more than participants' abilities, and modifications in practice can be required. It is also important to recognise individual needs and motivations as much as possible and to appreciate that participants are not homogenous.

6.1.4 Innovation: Discussion points

Evrard and Colbert (2000) state that innovation and project management are under-researched elements of arts management. This section contributes to this discussion. Pro-Am(A) and Pro-Am(B) were pioneering and innovative in scale and ambition. Terms like 'process' and 'product' can rally against the fluidity of theatre-making, but are helpful in understanding this work within a management context.

Process: the balance between rigour and support. There was evidence of how different directors direct the play and also 'manage' the participants (Cohen, 2011). This requires adjustments in practice when working with large numbers of non-professional performers. The objective of giving the participants a professional experience was a common refrain amongst the practitioners. However, they had to be flexible in their methods. This was caused by two key factors: the scale, and the mixed levels of experience of the participants. These two factors were mitigated through extensive preparation time; by the practitioners taking on some of the tasks which professional performers would be expected to do for themselves,

such as annotating scripts; and through the ways in which techniques and elements of the process were explained. Professional expectations and rigour throughout the process are what motivate participation and create high quality productions. **Language and vocabulary are crucial.** It is about maintaining professional expectations but explaining these to participants in a way which is accessible to all. Roznowski and Domer (2009) reflect on the importance of the vocabulary which directors use in rehearsal rooms, but this should be extended to address the differences when working with non-professionals and large casts.

Bilton's (2007) theory of allowing space within the system for the unexpected is pivotal in Pro-Am work. This should be extended to say that the amount of tolerance that is allowed for participants to feel ownership of the work is key, which reiterates the importance of experienced practitioners and leaders. Participants could walk away and the production fail; as one participant put it "*they need us*". The culture of commitment (Tomlinson, 1993), which can disenfranchise people, was evident in both cases but not extensively and is arguably inevitable with such large numbers. Both SPTOs did their best to alleviate it, by constantly **cultivating the ensemble dynamic** and placing the emphasis on learning over talent-spotting.

Importance of the workshop model in 'upskilling' the participants. Scher and Verrall (1987) reflect on the importance of technique in avoiding obstruction between performers and audiences. This theory can be extended with insight into how practitioners do this in the large-scale Pro-Am environment. The skills workshops had significant value in both case studies as they were resoundingly popular with participants and also equipped them with the skills for productions. In the case of Pro-Am(A) auditions were run in the form of informal workshops. This was the start of the journey engagement and those who did not make it into the cast were invited to attend other events and continue their relationship with SPTO(A). The skills workshops were a vital stage of the process, in between auditions and rehearsals. The participants who had successfully made it through the audition could learn new skills and techniques, as well as more about the production and the creative team in order to decide if they wanted to commit to the full rehearsal schedule.

The benefit for the practitioners was that they could start to get a sense of how to cast the participants and also see who might need extra support. The ways in which the workshops were delivered was also critical. I noted in both case studies that the participants were *learning* without the practitioners overtly *teaching*. This was achieved through the ensemble

approach, making the process fun, and explaining the purpose of each step, which led to incremental development.

I agree with Simon (2010) that: “The best participatory experiences are not wide open. They are scaffolded to help people feel comfortable engaging in the activity” (p.13) However, this study has added to this theory by exploring how it is achieved in a particular performing arts context.

The workshops were an integral part of the Pro-Am(B) model. They were designed to be a ‘skills exchange’ where the amateurs and professionals could discuss their practice and the practitioners could offer the amateur participants exercises and methods which had utility and could be recreated in their own rehearsals. This shows an immediate outcome and on-going legacy of the project.

Matarasso (2012) suggests that participants’ experience can be adversely affected by how the professional practitioners moderate the process. I argue that the pedagogical expertise of the practitioners is valuable, not just directing the play or sharing theatrical skills, but ‘managing’ the participants’ experience. Passion and enthusiasm are vital. **Pacing of the project** is also important. As one practitioner put it, participants should be encouraged to want to “*run alongside you*”. This means maintaining momentum through careful consideration of elements such as length of rehearsal sessions, rehearsal periods and performance periods, and what stage of the process to bring the whole ensemble together, if they are rehearsed in smaller groups. Detailed planning of each stage of the process is vital.

Ownership: imbuing the participants with the storytelling. All theatre-making requires project management. Time pressures necessitate a well-managed process, especially in large-scale Pro-Am initiatives where so many people are involved. Pro-Am theatre is about finding the right way to work with the participants who volunteer, or as one interviewee put it, “*going with the gift of who turns up*”, without compromising on the quality of the piece or levels of professionalism. It is about empowering the participants, with the director as ‘crafter’. Only so many people can be accommodated, and only one person can play each role, so the key to making Pro-Am as inclusive as possible is to add value at each stage. This may be an audition session which entices unsuccessful participants to come to workshops and other events, or

rehearsals in which someone with only a few lines to deliver gets as much time dedicated to them, and finds as much enjoyment in the process, as someone who has a monologue.

Participants appreciate a rigorous process. The balance of the process and product can be achieved with a combination of professionalism and care. There is a high level of expectation put upon the participants. They are expected to turn up and be committed, to listen, and engage with a rigorous process, as professionals would. Rather than being harsh, this is often a motivating factor for participants and can be a key element of the experience. However, this must be delivered with a significant level of care and appreciation by the organisation for the participants freely giving their time, commitment and emotional investment. Channels of access to the creative team and the pastoral mechanism should be established and clearly communicated.

The power of the product. A central tenet of Pro-Am work is how the SPTOs balance the offer of a stimulating creative process with a high quality end product (production). Many interviewees agreed that the benefits of participation are found in the process, but on the basis of my observations, I maintain that this is because the participants know they are working towards an end goal of having to perform together, in public. The creative product is an affirmation of the process experience, and the pressure of performance is a galvanising force.

Feedback and assessment mechanisms are crucial in delivering incremental improvements (Cashman, 2003). SPTOs should also consider the potential impact that reviews of the productions might have on participants. I agree with Davis and Scase (2000) that overall, critical success is more important than commercial. Critical success for both cases was not measured so much by good reviews, but by the participants' responses to the offer of the initiatives. There were indicators of commercial success however. For Pro-Am(A), there were full houses which generated revenue to put back into the project. In the case of Pro-Am(B), the organisation stated in their annual report how many thousands of tickets had been sold for the project overall by the autonomous amateur companies. Klaic (2012) recommends that funded theatre organisations should focus on what makes them distinctive and not emulate the work of the commercial sector. Both Pro-Am projects did this, by focussing on their strengths as a collective of experienced theatre-makers with outreach experience.

Regarding amateurs appearing in professional casts, as occasionally happens in the Pro-Am(A) model; the findings showed that this should be motivated by the artistic vision, and not the opportunity to fill stages with inflated casts. If the addition of some community cast members comes from an artistic impetus, if the professional and non-professional positions of all the cast and creative team are respected and the process is carefully managed, it can be beneficial for all parties. This is how Pro-Am(A) approached it.

Sharing spaces: inviting and hosting participants. Pro-Am practitioners and facilitators should endow participants with a sense of ownership of two vital elements, the work and the space. McAuley (2000) discusses the variety of social spaces within theatre buildings which audiences can explore, but the literature should reflect the ways in which large numbers of participants inhabit the SPTO space. Pro-Am initiatives are an invitation to access the professional space (Hanna and Kamel, 2007). However, this should not just mean the stage, but other areas of the SPTO buildings. It may be that, as one interviewee suggested, buildings will have to start changing to accommodate these projects.

Klaic (2012) alludes to the relationship between theatres and food but once again, this is from the audience perspective. It was striking in the data how many times the subject of food was raised. The literature should reflect the goodwill and ability to unite participants which can be generated from offering food, even on an occasional basis. Participants should not only be invited into the professional space, but hosted. The offer of food, whether in the form of access to staff facilities, a discounted rate at the theatre's café, a meal for the whole company at some stage of the process, or tea and coffee for evening rehearsals, should be considered in the planning, budgeting and pacing of the project.

These findings prompted consideration of literature pertaining to hospitality. Lashley, Lynch and Morrisson (2007) state that hospitality can be found throughout the arts and social sciences and is not the sole domain of the commercial services. Lashley et al (2007) apply the concept of hospitality as a social lens, arguing that the theory should be extended beyond that relating to the provision of food, drink or accommodation. Brotherton and Wood (2007) argue that hospitality can be a form of social control as well as exchange, which is echoed by Lashley et al (2007), who state that hospitality within organisations can be used to both invite and exclude. However, this was not my experience. The findings in this study suggested that the facilitators valued the participants' time and commitment and recognised that their

physical comfort affected the quality of their participation experience. The gesture of either offering access to refreshments or offering refreshments directly was also viewed as part of the collaborative theatre-making experience. For example, through the cast and creative team sharing drinks or a meal together.

Lynch, Germann Molz, McIntosh, Lugosi and Lashley (2011) intellectualise hospitality and discuss how the critical perspectives on hospitality can be framed within different contexts and academic disciplines. This can “bring the concept of hospitality to bear on some of the most pressing social, cultural and political questions of our time” (p.3). Lynch et al (2011) explain that the interactions between hosts and guests are complex and varied. In the context of this study, my perspective on hospitality is that it is this interaction which facilitates the theatre-making process. The *offer* of Pro-Am theatre, the *invitation* into professional spaces, and the approach to *hosting* participants can lead to new models of theatre-making on an epic scale and can also lead to large numbers of people having meaningful engagement with their local SPTO.

The initial literature review alerted me to data relating to food which occurred within the case studies, but this developed into a greater understanding of how large numbers of participants are hosted within the professional space, which has become an unexpected contribution. This study extends the theory on hospitality in the arts and the ways in which arts organisations ‘converse’ with the public through the introduction of large-scale Pro-Am initiatives, not just through the creation of art, but through the ways in which participants are hosted in their buildings.

Initiatives in which public participants are invited and hosted within SPTOs can make organisations more porous. Brown et al (2011) evoke a speech given by change management consultant Hannah Rudman (2009), in which Rudman states that organisations should not see participatory work as relinquishing control of the creative process but should embrace the opportunity for ‘organisational porosity’. This is defined as “a mindset that allows for a free exchange of creative energy between an arts organization and its public” (Rudman in Brown et al, 2011, p.17). This was evident in both case study initiatives.

Pro-Am productions as events. The challenge of marketing Pro-Am initiatives to audiences and participants can be approached by treating the productions as specially structured

events. Non-traditional theatrical performance spaces increase artistic and logistic risk (Wilkie 2002), even more so with large numbers of non-professional performers. However, the spectacle of the space can be used to publicise the event. Productions such as the large-scale promenade shows created by Pro-Am(A), or the showcases of Pro-Am(B) should be positioned as a change in the format of seeing a traditional play. This strategy can speak to audiences who think theatre is not for them, and perhaps even encourage them to become participants.

Marketing to audiences and participants. The findings showed four main objectives when introducing Pro-Am initiatives. They should align with the SPTO's main dramatic programme, appeal to current audiences, attract new audiences, and encourage audiences to become participants. Identifying the most successful elements and focussing on selling these to participants and audiences is key. Audiences can be value ambassadors (Walmsley, 2013b), but so can participants, perhaps even more so.

Brand association was important to both case studies. The Pro-Am productions had no star names to market them with and in fact the SPTOs celebrated the community casts within the marketing. I came across audience members in both case studies who treated the productions like any other professional show. Participants also trusted the brands of the SPTOs, putting themselves in their hands. This is reciprocal. Pro-Am initiatives can also enhance the brand of SPTOs, by positioning them as forward-thinking and focussed on local communities.

6.2 Contribution to performance studies

My secondary contribution to knowledge goes beyond the leadership, risk and innovation framework by adding a developed understanding of the **concept of Pro-Am theatre** to the performance studies discussion.

6.2.1 The Pro-Am theatre concept: Discussion points

Considering Goodman and Goodman's (1976) definition of theatre as a temporary system, this study has suggested that **Pro-Am theatre should be viewed as a temporary 'system within a system'**, given its unique structure of a set of skilled theatre professionals assembling to work collaboratively with a set of theoretically unskilled amateurs. The literature does not cover a key difference between amateurs and professionals which is common to both case studies. Theatre-making can be a powerful and intense experience between casts and creatives (Medaille, 2010). However, the professionals who create plays within SPTOs then

usually disperse, but amateur theatre-makers stay together. This is often what perpetuates the amateur model. One interviewee told me their amateur company was “*cradle to grave*”. This is something the literature has largely ignored. Recognising this permanent element is important for arts managers. So Pro-Am(A) was embedded into the organisation and Pro-Am(B) worked with pre-existing amateur groups who would continue making theatre after the project.

Perhaps what it means to be a professional and an amateur is changing and these are in fact not binary terms but rather it is more helpful to think of a **spectrum of skills, knowledge and experience**. Perhaps in the hierarchy of knowledge, the amateur participant who has been fitting their amateur practice around another career for 30 years is more of an expert in certain elements of a Pro-Am project than the professional facilitator.

The offer and acceptance of Pro-Am initiatives is blurring the boundary between production and consumption. The Pro-Am models I have studied are increasing opportunities for participation and also championing the wealth of non-professional creativity that is already in action. Pro-Am theatre needs to be based on a **model of sharing and enabling, mutual trust, investment and respect**, not professionals showing amateurs a higher standard. It should not be hierarchical, with professionals ‘unlocking’ the participants’ creativity. It is not about displacement, meaning taking jobs away from professionals. It is about theatre-making, which should always come from an artistic impetus. It is about creating and sharing work which otherwise would not exist. It is about the organisations offering to share skills and working practices with the participants, and being open to learning and adapting their own practices, and the participants feeling valued by the organisations in a symbiotic relationship.

The appellation of amateur and professional. The journey through this study has led me to consider what the terms ‘amateur’, ‘professional’, ‘non-professional’, and ‘community’ mean within the context of Pro-Am theatre in SPTOs, and whether these are marginalising terms which are unhelpful in describing this type of artistic practice. For example, it seems inadequate to describe a homogeneous group of theatre-makers as ‘amateur’, as there are so many different stories, backgrounds and levels of experience within them. I have met someone who has belonged to an amateur company continuously for over fifty years, has acted professionally on occasion and had a full-time career away from theatre but has never stopped performing; someone with no theatrical experience who joined a Pro-Am initiative

as a tribute to a close family member who loved theatre and had recently passed away, then found the experience of making theatre more enriching and profound than they ever imagined; and someone who was incredibly active in the organisational side of an amateur company, representing the UK at global conferences on amateur theatre, but had no interest in ever performing. It is possible to be professional without being a professional.

Professionals bring their personal experiences just like amateurs do. Lesavre's (2012) theory on the value of techniques acquired through training actors was echoed by several interviewees, from training the actors' voice to addressing self-consciousness. One interviewee said it takes three years to train an actor's voice. There is also the theatre literacy gained from training. As practitioners from both case studies put it, professionals are on the "*front foot*" when they arrive at rehearsals and respond to direction more quickly. The vast majority of professional actors have had experience in youth, community or amateur theatre companies at some stage, which can all be valuable training grounds for the profession. Training seems to be the main distinction between amateurs and professionals in this context.

Just because something is done for love does not mean it is good or bad. Professionals can be motivated by the love of doing something just as much as amateurs. There are distinctions but also shared characteristics. I have come across amateurs who want to be called amateur and those who do not. I have seen and heard about motivations to learn skills, have fun, become a professional actor, and be "*part of something*". I have heard the exact same projects called 'people's theatre', 'community theatre', 'citizens' theatre', 'amateur', and 'Pro-Am'. It was insightful that people often did not know exactly what to call it, which echoes Brown et al's (2011) observation on the language used to describe the participatory arts as being in a state of flux.

Funded professional theatre organisations making connections with those who already have a passion for it can only strengthen the theatre ecology. Pro-Am theatre in all the forms I have studied is less about blurring boundaries between amateur and professional and more about making something new. **It is a third way**, which celebrates the distinctiveness of different types of theatre-makers who work together. Pro-Am theatre in SPTOs is special because of its fluidity to move between the 'homemade' and 'subsidised' spheres of the theatre ecology. It creates theatre in ways which the traditional amateur and professional

models cannot. I have referred to Pro-Am(A) and Pro-Am(B) as initiatives, because they feel like the start of something.

Reflections on the term 'Pro-Am' theatre. The definition of Pro-Am theatre used throughout (Perry and Carnegie, 2013) is a complex construct within theatre management. It was formed at the beginning of this study, as a way to classify the different models within the particular phenomenon being explored. I reflected on this throughout the course of the study. Two interviewees were critical of the term Pro-Am, one on the basis that 'we are all just theatre-makers', and another felt that it reiterated the distinction between amateur and professional. The occasional resistance I came across to the term Pro-Am was insightful. It seems we have moved on in terms of recognising the amateur contribution, but not from the pejorative connotations of the term 'amateur'. I wanted to use the term as a provocation, to gauge reactions and assess its value. The problem lies in the broad spectrum of skills and experience within the models. What we need is more discussion on the definitions and differences between them all. 'Pro-Am theatre' is not a divisive term, it is about collaboration between two sets of artists. It is not simply about professionals 'teaching' amateurs. Each side gives and receives, each side learns. There is value in acknowledging that the two parties are different, but celebrating the fact that they can work together to create something special which is outside the recognised models of amateur and professional traditional theatre-making. Perhaps Pro-Am(A) is a new model of community theatre, and Pro-Am(B) is more definitively Pro-Am, celebrating the differences of each side. I have critiqued the parameters of the term and embraced its complexity in light of my study. It has utility as a unit of analysis to investigate and discuss the case studies and lives within the discourse of arts participation, arts management studies and performance studies.

The participation ecology of the UK. Given the findings from this study, coupled with Ramsden et al's (2011) observation on the lack of literature on amateur arts in the UK, Neelands et al's (2015) recommendation that government recognises amateur creative activity, Troilo's (2015) assertion that the appetite for participation opportunities is only going to increase, and Brown et al's (2011) declaration that the terminology surrounding arts participation is always changing, we need to broaden the debate on the diverse forms of arts participation.

As Holden (2015) states, there are different ecologies which span the arc of cultural ecology. If we have a theatre ecology which is part of the broader cultural ecology, I propose a 'participation ecology'. This can be used as a frame in which funders, policy-makers, practitioners, arts leaders, academics, and participants and their representative bodies can discuss the definitions of participation, the challenges and benefits of different models, how to develop new models and what one model can learn from another, with the motivation for participation as a driver for debate.

The participation ecology connects all those people who do not practise an art form for a living, yet it is a significant part of their life, or as Lan (2013) puts it, "for whom making art of a thousand different kinds is a passion – though not a profession" (p.19). The organisational perspective on large-scale Pro-Am theatre in SPTOs is a part of the participation ecology. It is just one approach, there are many others to discuss.

7 Conclusion

The findings chapter addressed the main themes and subthemes, which the discussion chapter consolidated and explicated. This concluding chapter returns to the central question and objectives, then finally, makes proposals for further research.

Through a qualitative and interpretive study, this PhD research has given new insight into the phenomenon of large-scale participation initiatives in some of the UK's most renowned funded theatre organisations. Findings were drawn from interviews with theatre professionals, non-professional participants and external experts in issues relating to participatory theatre; observations of the Pro-Am process and product; and documents pertaining to Pro-Am projects. Schools of thought from arts management and organisation studies, performance and theatre studies, leisure studies, and cultural sector and policy publications all informed the outcomes.

This study has captured a moment. I have steered a path through all the diverse voices to present an understanding of the catalyst for a renewed approach to arts participation. As a social scientist and theatre specialist, I have conducted a multi-method study and narrated the story of a cultural activity. My theory is contextual. I have approached it by looking at the management and creative processes involved in creating two high-profile projects.

This is the first in-depth study of large-scale participation initiatives in subsidised theatre organisations from a management perspective. I have defined this form of theatre-making through close examination of the literature, and used the framework of leadership, risk and innovation to further my understanding of it. Several substantive conclusions run through the findings.

7.1 Central research question:

How are theatre organisations affected by large-scale participation initiatives? Both organisations were affected very positively by the case study initiatives. Both received a positive reaction from participants and the wider theatre industry. Both had seen positive organisational change, though this had not been part of the strategic rationale for either project, and outreach work had taken a more prominent role. The case study initiatives were successful because the people involved showed strong leadership, mitigated the risks, and adapted their working practices, both creative and managerial.

However, the answer to the central question is just the beginning of this study's contribution to knowledge. For those leaders of SPTOs who are considering offering similar initiatives, I recommend planning to the same level as professional productions, or even higher. They may even find the participatory work inspires ideas for professional shows. This does not signify any less prevalence given to professional work; there is no displacement. Rather, Pro-Am work can create opportunities for professional writers, directors, practitioners and performers. SPTOs need to consider participation initiatives, not as an 'add-on' or an 'other' which is annexed away from the rest of the work, but as part of the overall artistic output of the organisation when planning a season's work, budgeting and designating resources. If done well, large-scale Pro-Am initiatives in SPTOs can add value to organisations and can be an investment in the theatre ecology and the wider cultural ecology of the UK.

Case studies summary

The two case study initiatives were selected because they were ambitious, complex and pioneering models of Pro-Am theatre in SPTOs. There were a number of contrasting features. For example, Pro-Am(A) was at a regional level, working with individual participants from the locality of SPTO(A) and who had varying levels of theatrical experience. Pro-Am(B) worked with pre-existing groups of amateur theatre-makers and was a national undertaking. However, there was also a regional element within the partner theatre structure, whereby each partner theatre, including SPTO(B), was encouraged to develop a relationship with local amateur groups.

As has been explained, the two case study models were quite different in many ways. But what was striking was the number of similarities between how introducing the initiatives had presented challenges and opportunities for the organisations. Both were supported by the same charitable trust, with funds awarded on the basis of the initiatives being innovative models of theatre engagement. The two SPTOs provided additional funds to subsidise these awards. Leaders and facilitators at both SPTOs realised early on that demand for the opportunities which the initiatives offered far exceeded their initial expectations. This meant that both initiatives were adapted incrementally and reiterates that scale was the most significant influencing factor in making the projects risky and innovative. Both sought to tailor the offering to the needs of the participants and did not just offer a one-size fits all approach. Both embraced the opportunity to develop innovative creative and management practice.

A common refrain throughout the findings was the motivation to share skills and offer a 'professional' theatre-making experience. The facilitators felt that participants responded to professional expectations and enjoyed being challenged. Pastoral care was a more prominent element of Pro-Am(A), but I argue that having a system in place for participants who need extra support through the process is valuable to all such models of theatre-making.

I learnt a lot that I did not expect to find within the case studies. One example was the importance of learning, not only in the context of what the participants learnt about the art of theatre-making, but what the leaders and managers within the SPTOs learnt about the participants, their own practice and the effectiveness of their organisational structures. Another unexpected finding was the importance of the way the offer is made by the SPTOs to the participants and the concept of hosting in the arts. Both SPTOs took the approach of offering to share skills and resources. This was more overt in Pro-Am(B), which aimed to bridge the gap between the amateur and professional sectors, but was integral to the success of both initiatives.

SPTOs can be cultural shapers and responders. The case study SPTOs were clearly responding to an appetite for participation, but also offering new ways for people to engage with theatre-making at national and regional levels. The two SPTOs are renowned and have strong brands which can generate interest in their practice, both creative and managerial, and can therefore provoke further debate on models of participation. However, the models could be adapted and replicated by SPTOs of different sizes. The benefits of the initiatives outweighed the risks. These include the opportunity to: create meaningful relationships between the organisations and their local communities; develop working practices, both creative and managerial; and for staff to develop skills and become 'better at their jobs'. It seemed to me that the passion and commitment brought by the participants had enriched both organisations.

Pro-Am(A) and Pro-Am(B) could be viewed as exemplars of action research for the two SPTOs. This is often used to solve a problem in an organisation, with changes made and reflected upon through a series of cycles (Seale, 2012). However, the action research tradition can also be used to evaluate changes in practice. The SPTO leaders and managers could therefore evaluate the process of introducing the initiatives, with the participants reflecting on their experiences as collaborative co-researchers in order to benchmark best practice and make incremental changes for the future (Reason and Bradbury, 2008). This links to Simon's (2010)

assertion that developing new participation initiatives can add value to an arts organisation: “The best participatory projects create new value for the institution, participants, and non-participating audience members. When you are driven by the desire to create new value, you end up with the products that are transformative, not frivolous” (Simon, 2010, p.6). I would not say one initiative was more successful than the other because both experienced challenges, achieved recognition within the theatre industry, engaged with hundreds of participants and exceeded the SPTOs’ own expectations.

7.2 Objectives:

Understand how the concept of Pro-Am theatre is situated within current academic thinking and research agendas.

“When we understand how well current theory fits the practice of arts management, we will be better positioned to propose a coherent research agenda to support the practice of management in the arts” (Cray et al, 2007, p.312). This study has reviewed the literature relating to a particular type of artistic practice, then used empirical evidence to suggest where the theory can be extended.

Brown et al’s (2011) assertion of a shift from a “‘sit-back-and-be-told culture’ to a ‘making-and-doing-culture’” (p.3) was resonant across the current research trends and practical examples presented in the introduction, and within the reviewed literature. This study clearly adds to that conversation, particularly through the proposal of the ‘participation ecology’ as a frame for further discussion on participatory arts activities. If, as Troilo (2015) suggests, an increase in the demand for collaborative dramatic products is indeed “where the world is heading” (p.233), then this study is timely, and makes a significant contribution. The move from consuming to producing is perhaps a more pertinent blurring boundary than the Pro-Am divide, and as has been demonstrated, there is increased interest in arts participation amongst researchers, but very little in the literature yet which covers the phenomenon I have explored. The distinctiveness of this PhD research lies in its organisational perspective on theatre participation. It has reported back to the established fields of arts management studies and performance studies. Having started with the initial question ‘what is going on here?’ (Lindlof and Taylor, 2011) this inductive study has used the literature to understand

large-scale Pro-Am theatre in SPTOs, then contributed back to the literature to account for this phenomenon.

Identify prominent SPTOs with participation programmes and select the most multifaceted activity (large-scale Pro-Am initiative).

The Pro-Am(A) model afforded the opportunity for me to explore how a large non-professional theatre company had been embedded into a flagship regional organisation (SPTO(A)). It created a year-round programme of work and an annual epic production.

Pro-Am(B) allowed me to contribute to knowledge by studying a nationwide project between a world-renowned organisation (SPTO(B)) and adult participants who had a pre-existing passion for, and engagement with, theatre.

Both initiatives presented organisational challenges and opportunities. At the time of writing, Pro-Am(A) continues. Pro-Am(B) has ended but SPTO(B) has created another ambitious Pro-Am project and are discussing further plans. They are working on new ways to continue the conversation with the amateur sector and build relationships in order to capitalise on nationwide enthusiasm from participants and audiences.

Explore the external policy and funding environments of SPTOs.

“Achieving great art for everyone” (ACE, 2010) stipulates a blend of quality and access, which these initiatives offered. Central and local government funding have been decreasing with no sign of change. Both projects were endowed with an award from a charitable trust, a valuable resource which would not be available to every SPTO whose leaders wished to offer these kinds of initiatives. However, these awards can be viewed as investments in shaping Pro-Am models and developing best practice, which can be valuable to other organisations and the wider theatre ecology. Developing a strategy for longer-term financial provision for these initiatives in funded theatre organisations leads back to the debates surrounding arts funding and policy interventions.

Discover how large-scale Pro-Am initiatives in SPTOs are structured, administered and led.

I considered the reflections of the people involved, and explored not only the technicalities of the projects, but how they affected their parent organisations. This empirical study has focussed on artistic, administrative, logistic, and pastoral elements and made a significant

contribution to knowledge on the topic of the organisational perspective on large-scale Pro-Am initiatives in SPTOs. Examples include:

Leadership: Keystone leadership. This is a new style of leadership within arts management, which is particularly pertinent to the introduction and embedding of ambitious new initiatives into an organisation.

Risk: The scale of such initiatives underpins the risk. It is a composite of risk to the organisation and the perceived risks of the participants. Balance must be found between the logistic requirements and the artistic vision and between resource management and demand uncertainty. A mechanism for pastoral care is recommended and the participants' contribution should be valued. Artistic risk should be embraced (and supported by keystone leaders). This is the responsibility of the 'pros' in the Pro-Am model. Strategic planning and a skilled creative team are vital.

Innovation: Success lies in the balance between process and product. The process should have rigour and professional expectations, but be offered with support. 'Scaffolding' the experience for participants and strategic pacing of the overall project are key. Workshops are vital in sharing skills, and the model: audition, workshop, rehearse, show is highly valuable. Participants should be imbued with ownership of the work and the space. They are not 'managed' in the professional space, but 'hosted'. The initiative should be holistically embedded within the organisation, with each department and staff member understanding the vision and their role in realising it. Practitioners and facilitators should be prepared to adapt creative and management practice as the project develops.

Investigate the internal managerial challenges and organisational implications of introducing amateurs into the professional domain of SPTOs; principally in terms of leadership, risk, and innovation.

Successful Pro-Am projects are run in much the same way as successful organisations. They need a bold leader who is willing to take risks and inspire followers. Both case study organisations embraced organisational change and took institutional risk. In both cases the initiatives grew, changed and improved, pushing the boundaries and trying to outdo the last piece of work. Both were also in a constant state of innovation.

Leadership, risk and innovation framework summary

This study has contributed to arts management theory through the application of this framework, using it to navigate the space of large-scale Pro-Am theatre in SPTOs. I selected, combined and applied theories of leadership, risk and innovation to address the study's aims and objectives. Having framed each of these broad and deep themes individually in the literature, I found that they cannot be separated in practice and so wove them together as a framework to apply to the case studies. Each theme is connected to another, but the findings showed that leadership is where everything begins, which is why the concept of keystone leadership is a significant contribution. It is the scale and ambition of the initiatives which underpin the study's contributions to theory on risk and innovation in arts management.

Consider the potential implications for the future of Pro-Am work in SPTOs, and its place within the subsidised sector of the UK's theatre industry.

Practical implications

I believe the reason more organisations do not currently run these types of initiatives is that large-scale Pro-Am work is rather akin to the swan serenely gliding across the water, whilst paddling wildly underneath. It is a complex and challenging undertaking, and in order to be successful, a team of skilled and experienced practitioners is essential, atop an organisational infrastructure able to provide operational, administrative and pastoral support for the creatives and the participants.

It is the people who make large-scale Pro-Am work happen. However, if there is guidance available for managers and the right systems are in place, the Pro-Am(A) and Pro-Am(B) models could be replicated by other SPTOs, large and small. These organisations could experience the benefits of creating a people's theatre company and of meaningful engagement with local amateur theatre-makers. For example, other organisations could facilitate the styles of leadership seen in this study's data. Keystone leaders are those who lead from the centre rather than having a top-down approach and take a holistic view to understand how launching an ambitious new initiative might affect the organisation as a whole. Whilst the data showed that this leadership style emerged from the character traits of individuals, the keystone approach could be purposefully adopted by others as part of the strategy for introducing a new initiative. This would entail the person with responsibility for

the project being a supportive presence and encouraging risk-taking, offering access to resources and paying close attention to how the initiative is being embedded into the organisation. To give another example, the instances of informal (Byrnes, 2015) or emergent leadership (Pescosolido, 2002) which were found in the data could be encouraged by other organisations through giving the participants ownership of the work, valuing their input and encouraging them to play an active role in the creative process. Similarly, the facilitators and practitioners I interviewed also spoke with a sense of pride and 'ownership' of the initiatives, and so encouraging staff at all levels of the organisation to be invested in the project, or what Hewison and Holden (2011) call 'distributed leadership' could be recreated by other organisations and create successful projects.

Scale has been identified as the most significant risk factor of initiatives such as those explored in this study. This should be acknowledged and mitigated in the planning stage, which can be done by breaking down the view of risk into categories such as artistic, operational, financial, and reputational. Risk should be approached as a composite of risk to the organisation and the perceived risk of the participants. Initiatives of this size and complexity also require an innovative approach, with leaders, facilitators and practitioners being prepared to adapt creative and management practice. Particular attention should be given to the structure, pacing and timing of the overall projects and the productions they create. Managers should also take the approach of inviting and 'hosting' the participants in the professional space, rather than 'managing' them.

It would be valuable to share the challenges and best practice of large-scale Pro-Am theatre between SPTOs, as part of the aforementioned 'participation ecology' frame. This could be achieved through scholarly research, such as this thesis and the further output to come from this study, as well as through articles written by SPTO leaders, managers and Pro-Am practitioners in theatre industry publications. A symposium on large-scale theatre participation could also be beneficial in advancing this kind of work, with practitioners, managers and participants sharing their experiences and debating the challenges, benefits and future possibilities, both creative and managerial. ACE could also disseminate information on these kinds of participation activities to the organisations they support, should leaders of other SPTOs wish to undertake this work.

Policy implications

The findings from this study led to consideration of the potential implications for cultural policy regarding arts participation. Jancovich and Bianchini (2013) and Bilton (2015) state that the perceived benefits of arts participation and creativity within society mean they remain on the public policy agenda. Therefore developments in engagement strategies in the field should be of interest to cultural policy-makers, because they are evidence that funders are not perpetually supporting the same models of participation. This suggests that this study's findings should be good news for policy-makers, but what might the future hold?

The findings from the study do not suggest that all theatre should be made this way, or indeed that the kinds of models explored should be precisely replicated by every SPTO in Britain, but it is clear that there are benefits which justify the time, funding and resources. This type of work is not a panacea for solving engagement challenges, but it is an opportunity for a different kind of participation. It offers the chance to engage with theatre in new ways, as one interviewee put it, by *“learning about theatre from the inside, gaining an appreciation of it and then gaining access to it”*. Large-scale Pro-Am theatre is a developmental process which is continually growing and changing.

This study has contributed to the discussion on the cultural policy surrounding arts participation by considering whether there are grounds for a policy intervention to reflect developments in the field, whereby large-scale Pro-Am initiatives such as the two case study models would be a prerequisite for funding. On reflection the findings suggest that a change in policy would not be appropriate at this stage, but I do believe that SPTOs should at least have to justify and explain their participation strategy within their funding application. Then within each funding renewal application the leaders should reflect on the strategy, assess it and make plans for the coming funding period. To give another example, an unexpected finding from the data was the innovative management practice of the trainee AD programme at SPTO(A). Perhaps ACE should encourage more SPTO leaders to train the next generation in the rigours of running a building and in exploring the role of an SPTO in its local community. This could include taking the same considered approach to participation as they do to the professional work.

Furthermore, this study can contribute to the field of cultural policy studies (O'Brien, 2014; Lewis and Miller, 2003). For example, cultural policy scholars could explore how much needs

to change in the field before policy-makers begin to develop a response, and steps taken to encourage a particular practice to be adopted more widely.

7.2.1 Reflections on the research journey

This study has been an enlightening experience for me as a researcher. It was a privilege to have extended access to the creative and management processes in action, to see them change and develop, to see new models of theatre-making emerge and to speak to practitioners, managers, leaders and participants about what theatre means to them.

My approach to the research was shaped by my own self-awareness and reflexivity. I learnt to 'wear different hats', to see and think differently throughout the process. For example, when observing a rehearsal of a Pro-Am production, I was aware of my position as someone who has worked in the performing arts sector and is a keen theatre-goer, yet also as a scholar who had to maintain a critical distance from my research subject. I was also acutely aware of my fluid position on the insider/outsider spectrum. This meant that although I had a developed understanding of the creative process, which was beneficial when interviewing practitioners, I was an outsider to the case study organisations and initiatives and had no experience of working in a large SPTO.

I took a reflective and reflexive approach throughout the process, constantly considering my role in the research. One interviewee commented on how large-scale Pro-Am theatre is about "*embracing the chaos*", and another said it was about "*going with the gift of who turns up*". These statements resonate with my experience of this study. I learnt that whilst qualitative research can sometimes be unruly and challenging in its unpredictability and scale, it also offers extraordinary opportunities to explore human actions, reactions, emotions and perspectives and to gain an expansive understanding of a topic. Having said this, I also learnt that I could not address every single facet of my research field. I would often come out of an interview or observation session wondering what a different stakeholder might think about something I had seen or heard, but endeavoured to adhere to the parameters of the study in order to maintain clarity and address the research questions and objectives. I knew that the amount of data was always going to be a challenge, so I was methodical in my approach and the themes and sub-themes I developed through the leadership, risk and innovation framework were vital to managing the dataset, whilst also allowing space for unexpected yet insightful findings to emerge.

Having reflected on the overall process, there is very little I would change. If I had chosen different case studies I would have lost the opportunity to have access to ground-breaking initiatives and to interview some of the leading figures in British theatre as well some of those for whom theatre-making is not part of their job but is a significant part of their life.

7.3 Agenda for further research

In light of my findings and the points raised in the discussion, I have identified four areas which I feel merit further research and I would like to pursue:

7.3.1 The role of language, semantics and terminology

A surprising contribution of the study, which emerged strongly in the findings, was the variety of language used to describe the initiatives and people's reactions to them. Some interviewees acknowledged the importance of language within the case studies, such as the terminology used to explain the professional process to participants with limited theatrical experience, but there were other instances where the language used within the data stood out. For example, the term "amateur" was contentious because it was both rejected and embraced within the case studies; the collective term "gang" was used to define everyone involved in the production, rather than the more commonly used "cast and creative team"; and on more than one occasion, interviewees referred to how "the building" welcomed people, or had a conversation with people, as if it had a persona.

Cornelissen (2005) discusses the significance of metaphor and semantics within organisations and I intend to further explore the role of language, semantics and terminology within the context of an organisation's values, mission and vision. For example, what the term "building" gives to an arts organisation and how its self-referential use corresponds to the organisation's mission and values. This also links to the following idea for further research into strategic arts management within the amateur theatre sector, and the differences between how amateur theatre companies which have and do not have buildings define themselves.

7.3.2 Strategic arts management within the amateur theatre sector

The findings of the study have suggested that another contribution to knowledge could be made through investigation into the UK's amateur theatre sector from a management perspective. For example, considering the concept of autonomous amateur theatre companies as organisations, and the management issues involved. Strategic arts

management within the amateur theatre sector is another under-represented topic in the literature.

It could be argued that there are similarities to commercial enterprises, as amateur companies have to be financially sustainable, and are run on a professional basis, albeit by hobbyists, on a collective volunteering-based model. Amateur companies with their own buildings also share many of the same concerns as SPTOs and understand how creative freedom can be encumbered when the roof needs mending. Sponsorship and philanthropy are also evident in the amateur theatre sector. Therefore it exists outside the realms of public cultural policy and funding, yet has much in common with funded theatre. This exploration of amateur theatre could then be developed to give further consideration to Pro-Am theatre and the relationships between the amateur and professional theatre sectors from the amateurs' perspective.

7.3.3 Pro-Am theatre audiences in SPTOs

The study in its original form did not investigate the relationship between Pro-Am theatre and audiences, because the study was rooted in the organisational perspective, and parameters had to be set. However, my interest in the audience perspective developed throughout the study. Some lines of inquiry suggested by the findings which I would like to follow-up are: to what extent audiences are localised, as it was suggested that audiences would travel to see 'star' performers but not productions involving amateurs; whether the productions by the established Pro-Am(A) company were developing their own 'niche' audience who saw every show but were not friends or families of the participants; whether audience members of Pro-Am productions on the SPTO stages who were introduced to the SPTO through the Pro-Am productions were coming back to see other shows; how many people who had come to see a Pro-Am production had been 'converted' into a participant; and trends in Pro-Am production ticket prices. Interviewees from both case study SPTOs showed interest in understanding Pro-Am audience trends but did not have any data as yet. One SPTO leader offered to provide access for me to research this further.

7.3.4 Participation opportunities within SPTOs

I would like to extend my research into adult participation initiatives at subsidised theatre organisations beyond SPTOs A and B.

During my research I learnt of networks of opportunity at other organisations, including interpretation initiatives through which people can watch, explore and critically engage with theatre-making. This goes beyond direct engagement through performance. Play-reading and ‘critics clubs’ exist, where people convene to watch a show at an SPTO then discuss it. Although facilitated by the organisation, no professionals are present, so the group members can talk openly without feeling intimidated. There are other examples of local people inhabiting theatre spaces, with public money democratising theatres, providing a public service, and offering opportunities to engage with theatre. This would contribute further to the scholarly conversation on arts participation in the UK.

Having studied the two models of large-scale participation initiatives at regional and national organisations, I am also keen to see what can be learned from similar models outside the UK.

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