

Response to request for information provided to Shakespeare Globe Centre New Zealand in Toi Uru Kahikatea Investment Programme Request for Proposals 2022

2 November 2022

Creative New Zealand has published the following document:

- Response to an Official Information Act 1982 (OIA) request for the *Toi Uru Kahikatea Investment Programme Request for Proposals 2022, Assessment Comments for Shakespeare Globe Centre New Zealand*.

We publish OIA responses where there is public interest in the information.

Some information has been withheld under the OIA to protect the privacy of natural persons and information subject to an obligation of confidence. Where this is the case, the relevant section of the Act is identified. Where information was withheld, no public interest has been identified that would outweigh the reasons for withholding it.

Further information on this release is on our website:
www.creativenz.govt.nz/decision-info-SGCNZ



2 November 2022

s9(2)(a)

s9(2)(a)

Tēnā koe s9(2)(a)

Official Information Act request re Shakespeare Globe Centre New Zealand

Thank you for your Official Information Act 1982 ('the Act') request received on Tuesday 18 October 2022.

You requested:

"the rejection note and assessor's comments that was provided to SGCNZ as part of its recent Kahikatea programme funding application that's been heavily reported on."

Please find the information you have requested **enclosed**

Some information has been withheld under section 9(2)(ba)(i) to protect information subject to an obligation of confidence and where making available the information would be likely to prejudice the supply of similar information.

This response will be published on our website. Your personal information, including name and contact details, will be removed for publication.

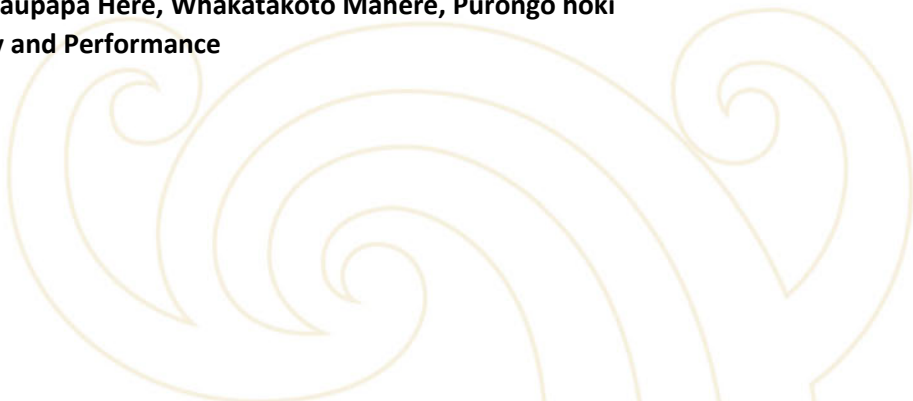
If you wish to discuss this information request, please get in touch via email to:
info@creativenz.govt.nz.

You have the right under section 28(3) of the Act to seek an investigation and review by the Ombudsman of this decision. Information about how to make a complaint is available at www.ombudsman.parliament.nz or freephone 0800 802 602.

Ngā mihi nui, nā



Elizabeth Beale
Pou Whakahaere Kaupapa Here, Whakatakoto Mahere, Pūrongo hoki
Co-Manager, Policy and Performance



Released under the Official Information Act 1982

From: [Investments](#)
To: [Dawn Sanders](#)
Cc: [Shakespeare Globe Centre](#); [Investments](#)
Subject: Outcome of the Toi Uru Kahikatea RFP
Date: Monday, 12 September 2022 1:42:00 pm

Kei aku nui,
kei aku rahi,
kei aku whakatamarahi ki te rangi,
kei aku whakateitei ki te whenua,
Tēnā koutou katoa.
Tēnā koe Dawn,

Thank you for submitting your proposal for funding through the Toi Uru Kahikatea programme in 2023–2025. We acknowledge the time and effort that was required to prepare the submission, especially during such challenging times.

Unfortunately, your proposal has been unsuccessful. As you may have heard, Creative New Zealand is facing a constrained financial future after supporting the community through the initial impacts of COVID-19 and to achieve our strategic aspirations for the investment programmes in 2023–2025, some prioritisation was required.

We acknowledge that you will be very disappointed with this result. Shakespeare Globe Centre NZ Trust remains a valued and respected member of our community so, once you and your trustees have had an opportunity to digest this news, should you wish, Caren Rangi (Chair, Arts Council of New Zealand Toi Aotearoa) and I can meet with you and/or representatives of your board, rangatira to rangatira, to help you understand the context of this decision and explore your provisional thinking about your next steps. We can also provide you with a summary of commentary related to your proposal to help you understand how the Arts Council came to their decision.

We acknowledge that this won't be the outcome you wanted, but you have some time to think about and plan your next steps. In further acknowledgement of the impact this decision will have on Shakespeare Globe Centre NZ Trust and to assist you to adapt to your new funding context, the Arts Council will make Transition Fund support available to you at 75 percent of your 2022 funding, pro-rated for six months, through to June 2023 (as below):

Funding Period	Funding
1 January – 30 June 2023	\$11,935
Total Funding	\$11,935

Next Steps:

Please let us know whether you would like to meet with Caren and I by emailing me at stephen.wainwright@creativenz.govt.nz

Our investment services team will be in touch to help you access the [Transition Fund](#) and to provide information about other opportunities available to you at Creative New Zealand. In addition to Transition Fund support, you will be eligible to apply for the other CNZ funding opportunities, including Annual Arts Grants 2023. Please check out our website for more information: <https://www.creativenz.govt.nz/Funds-and-opportunities/Find-opportunities>

We will post a list of successful applicants on our website on Friday 16 September and ask for your discretion until the results are public.

Ka tō he rā, ka rere he rā.

As one day sets, another day dawns

Ngā mihi,

Stephen Wainwright

Chief Executive | Pou Whakarae

Creative New Zealand | Toi Aotearoa

E: stephen.wainwright@creativenz.govt.nz W: creativenz.govt.nz

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Toi Uru Kahikatea Investment Programme RFP 2022

Assessment Comments for Shakespeare Globe Centre NZ

This document includes the following information on Creative New Zealand's assessment of Shakespeare Globe Centre NZ's submission of a proposal to Toi Uru Kahikatea Investment programme (Kahikatea) for 2023-2025:

- A. The assessment process
- B. External peer assessor scores and commentary
- C. Creative New Zealand internal assessment of financial viability
- D. Extract from the minutes of the Strategic Advisory Panel meeting on Monday 11 July & Tuesday 12 July 2022 relating to your organisation's proposal
- E. Extract of recommendations from the paper prepared by Creative New Zealand staff for the Arts Council's consideration relating to your organisation's proposal
- F. Extract of discussion from draft minutes of Arts Council meeting on 16 and 17 August 2022 (minutes to be formally approved at Arts Council October 2022 meeting) relating to your organisation's proposal
- G. List of external peer assessors and panellists

We provide this information in the spirit of openness and transparency and to help you understand how the Arts Council came to their decision.

Some information has not been released or has been redacted as it would be withheld under section 9(2)(ba) of the Official Information Act 1982, to protect information subject to an obligation of confidence.

The Evaluation Approach used by Creative New Zealand to assess Proposals is set out in Section 5 of our Request for Proposals (RFP) document. A copy of this document was provided to you in advance of your submission and is publicly available on our [website](#).

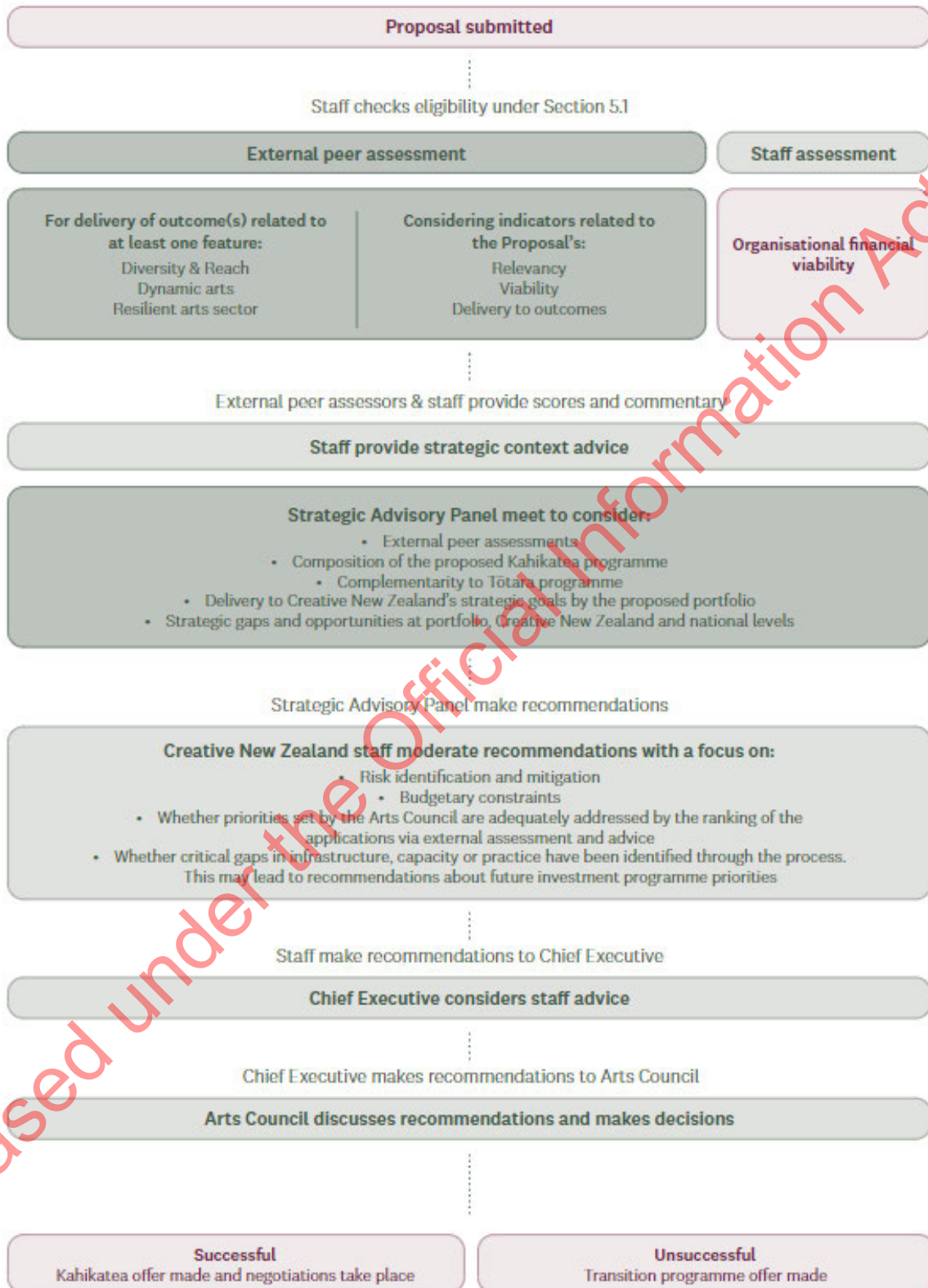
The Evaluation Approach involves a series of 'checks and balances' to ensure that our decision was based on the most robust and comprehensive understanding of your organisation possible.

If you would like more information or to discuss further, please email investments@creativenz.govt.nz or follow our [request for information](#) process.

Further issues or information can follow our established [complaints process](#).

A. The assessment process

See Section 5.2 of the RFP document



B. External peer assessor scores and commentary

See Section 5.4 of the RFP document for more information about Assessment Criteria and scoring

Assessor 1

Relevance

BENEFIT– The proposed programme of activity is well-conceived for arts and cultural, economic, and social value.

4 Very good – Strong delivery to the statement

Your programme of activity continues the work Shakespeare Globe Centre NZ Trust has been undertaking for the past 31 years. In this time you have proved the ongoing value of your regional and national Shakespeare competition model to encourage the participation of young people in theatre and arts. I counted the number of participants projected across the 24 regional festivals, which came to 4600 young people. In addition, SGCNZ's Festivals involve 100 assessors and 30 tutors (I did not add up the audience members accessing the performances, but this is an outcome!). The festivals provide skill building for participants, and can inspire them to pursue careers in the industry, The endorsements that you highlight demonstrate that participation in the Festival can be life changing, leading to increased confidence and a life long passion for the performing arts. The endorsement from Te Wharekura o Mauao speaks to the value of participation by students in a reo immersion school, and credits SGCNZ with providing confidence for tairua to see they have a place in the theatre world.

COMMUNITY - The proposed programme of activity demonstrates the relevance to the artists, communities and/or audiences the organisation serves.

4 Very good – Strong delivery to the statement

The application does make me reflect on the ongoing relevance of Shakespeare, and question whether a singular focus on an Elizabethan playwright is most relevant for a decolonising Aotearoa in the 2020s and beyond. But perhaps this is a high level question for another time. The fact that the University of Otago Sheilah Winn Shakespeare Festival continues to grow in reach demonstrates the ongoing relevance of your offering to your core constituency: young people between 11-20 (or Years 7-13). I was particularly impressed by the finding that 78% of entries come from student directors, work that is driven and led by motivated students. You also mobilise 2300+ volunteers each year, again demonstrating the relevance. Shakespeare's texts remain imminently suitable for adaptation and experimentation, with young people drawing connections with Shakespeare's themes and making the plays relevant to themselves and their audiences through directorial and acting choices.

EVALUATION - The organisation has appropriate review processes in place to measure the impact of their work

3 Good – Meets the statement

Your application lists a number of review strategies and quality measures, including questionnaires for participating schools and regional organisers. It was not clear from the information in the application the extent that young people themselves have the opportunity to answer these questionnaires. There do seem to be informal avenues for young people to provide feedback (eg social media, emails), but you should consider whether young people are being prioritised in your current surveying methods. It would also be useful to track demographic data, so you can evaluate

the participation rate of priority groups. This would then allow you to identify if you needed to implement particular strategies to boost participation in under-served groups/regions.

VISION - The organisation has a comprehensive suite of strategic documents (e.g. artistic plan, strategic plan, business plan) that communicate a clear vision and purpose.

3 Good – Meets the statement

In the strategic plan you offer the laudable vision "to transform lives by mentoring potential through experiencing Shakespeare", which is put into action by the suite of activities you undertake, with further detail offered in the Operational Plan. Beyond sustaining SCGNZ and continuing its existing activities, I wanted to get a clearer idea of SGCNZ's longer term goals and where it is heading, with an aspirational vision for what SCGNZ would have achieved by the end of 2026 (per the strategic plan timeframe). I was surprised that the emphasis in this application on succession planning was not carried through in the Strategic and Operational plans. It is good to see a range of policies included in 'SGCNZ Policies Document for Creative New Zealand'.

ALIGNMENT - The proposed programme of activity is aligned with the organisation's strategic direction and will deliver to its desired outcomes.

4 Very good – Strong delivery to the statement

The programme of activities continue SGCNZ's tried and tested model which is aligned with your strategic direction. SGCNZ has the potential to continue to grow its reach by opening its registrations to non-school groups, most recently community groups. While not explicitly noted in your strategic document, I would suggest the issue of succession planning (highlighted in this application) and future proofing SCGNZ is of critical strategic importance. I am therefore encouraged by the proposed change in organisational structure with the addition of an executive assistant who can shadow the CEO.

Viability

BUDGET - The proposed programme of activity is supported by thorough, detailed, and realistic budgets, considers market rates and the principles of Creative New Zealand's Remuneration Policy

3 Good – Meets the statement

The budget appears to be reasonable and realistic. The SGCNZ Pay / Remuneration Policy details you provide indicate SGCNZ's current two staff are paid at market rates and short-term administrative assistance is paid at a living wage. I was concerned to read in your application of a staff member working 60-65 hours per week (this was mentioned as being the EA, which as I understand is a role that doesn't currently exist, so I wasn't clear which role this was referencing). While you provided this information to help make the case for an EA, it points towards the need to improve your current policy in line with CNZ's remuneration policy to ensure fair hours are worked. A notable feature of the budget is the reliance on volunteer hours. It is appropriate that you have requested honorariums for regional organisers. I'd encourage you to put clearer policies and protocols in place to help prevent volunteer hours from being exploited. Something I think is really important to acknowledge in relation to budget is that you do not charge a fee for your participants. While adding a fee would be a revenue generator, this is a crucial way that you keep participation financially accessible for young people across the country (unlike ShowQuest, which charges a fee),-notwithstanding other costs (transport etc) which can be a barrier.

PLANNING - The proposed programme of activity is well-planned and achievable in general and is responsive to the COVID-19 context

4 Very good – Strong delivery to the statement

This programme of activity is well conceived, with regional festivals leading towards a national festival, complemented by education workshops and other initiatives. You have consistently built and delivered this core programme over decades. You have a proven ability to adapt to changing pandemic contexts over the past three years. Your ongoing digital option means will allow you to remain flexible and response to the COVID-19 context.

ABILITY TO DELIVER - The organisation has appropriate capacity and capability (i.e. the right people, skills and resources) to deliver the proposed programme of activity well.

3 Good – Meets the statement

While SGCNZ has a proven track record of delivering the proposed programme of activity well, I do note there is an impression I have taken away from the application that your SGCNZ is facing pressure from being understaffed and overworked. It is good that you have acknowledged this, and are seeking to rectify this with the new EA role. Further details of the scope of this role (or even a draft job description) would have been useful to include to help demonstrate appropriate capacity and capability. One risk is the potential for differing standards of delivery across the country with each regional festival being organised by a regional representative. It was not clear from the application how these volunteers are appointed. I do see each rep will be "micro-managed", which will help ensure some quality control. Part of the rep's remit is to incorporate as much diversity as possible, which suggests that a high level of cultural competence and inclusive practice would be essential, but this is a lot of responsibility to place on a voluntary position. Further information about each rep would help make the case for SGCNZ having the right people, skills and resources. This raises a wider question about the training that is available for both SCGNZ staff and regional reps. In this application I noted instances of othering and ableist language (eg: "severely dysfunctional background", "totally blind"). While SGCNZ is clearly making great strides in inclusivity in participation, and I believe that this is unintentional, this does suggest more work could be done to ensure SGCNZ can adequately hold and affirm all participants. (Good steps towards rainbow inclusivity and acceptance of gender identities and pronouns).

Investment outcomes

FEATURE - The proposed programme of activity will deliver strongly to at least one Investment Feature Outcome

4 Very good – Strong delivery to the statement

You make a convincing case for delivering to the diversity and reach investment feature outcome. You offer 24 regional festivals across the country, and your participants include young people from schools, homeschooling and community groups, and you also encourage diversity in languages in performance. Including statistics from your recent years of activity would have helped further demonstrate your ability to deliver to this outcome.

PRIORITIES - The proposal delivers to an identified funding priority for this round

4 Very good – Strong delivery to the statement

Your activities clearly engage or benefit under-served communities: young people, and regions outside the main centres. Once again, I really applaud you for ensuring that there is no entry fee.

General commentary:

SCGNZ does not mention its director competitor, ShowQuest, 'Aotearoa's biggest performing arts competition', which has funding from the Ministry of Education. I raise this here as a wider artform issue for the panel to consider, and whether there needs to be better coordination between organisations and funders. With a busy calendar, schools may need to increasingly prioritise which competitions they put time and resources towards.

Assessor 2

Relevance

BENEFIT– The proposed programme of activity is well-conceived for arts and cultural, economic, and social value.

3 Good – Meets the statement

The organisation is clearly a part of the New Zealand theatre ecology over a period of time and this proposal proposes a continuation of their model, with reasoned arguments for an increase in support to resource the work of the organisation more effectively with a period of transition at CEO level

COMMUNITY - The proposed programme of activity demonstrates the relevance to the artists, communities and/or audiences the organisation serves.

3 Good – Meets the statement

The proposal is a continuation of their supported programme of work to date, and I, as an outsider, would assume that it continues to be relevant to the artists and communities it serves. The proposal does talk about how Shakespeare can be shaped and adapted to continue to be relevant and I would have appreciated a broader argument about how, in a rapidly changing environment, an organisation focused on one artist's work, remains crucial for support. The underlying model at the festival appears to be the same and I'd have appreciated in what ways the company, for instance, chooses participants in ways that address barriers to arts activities for many underrepresented people.

EVALUATION - The organisation has appropriate review processes in place to measure the impact of their work

3 Good – Meets the statement

The measures indicated in the proposal are suitable to measure the impact of the work. I'd have appreciated an example of the 'living' documents mentioned in the proposal as an example of the evaluation process in action.

VISION - The organisation has a comprehensive suite of strategic documents (e.g. artistic plan, strategic plan, business plan) that communicate a clear vision and purpose.

3 Good – Meets the statement

The proposal has a range of supporting documents that broadly support the vision and purpose of application. I'd have appreciated more detail within the documents about the ongoing relevance of

the work and company focused on one artist and how it saw that core purpose carrying forward in the future.

ALIGNMENT - The proposed programme of activity is aligned with the organisation's strategic direction and will deliver to its desired outcomes.

4 Very good – Strong delivery to the statement

As the proposal looks to build on the organisation's historical work which has clearly been well produced and delivered I don't doubt with funding they would be able to deliver their desired outcomes.

Viability

BUDGET - The proposed programme of activity is supported by thorough, detailed, and realistic budgets, considers market rates and the principles of Creative New Zealand's Remuneration Policy

3 Good – Meets the statement

The company clearly has a track record of successfully creating and working to budgets, and I believe that the figures provided are both detailed and realistic within the terms of the application. The honorarium appears to be a token for the work undertaken, though it doesn't appear to fall outside the NZ Arts Council's remuneration policy.

PLANNING - The proposed programme of activity is well planned and achievable in general and is responsive to the COVID-19 context

4 Very good – Strong delivery to the statement

In terms of planning and its responsiveness to COVID-19 the application is strong. I've no doubt that the plan, if funded, would be achievable with the extra resources brought in to support their development aims.

ABILITY TO DELIVER - The organisation has appropriate capacity and capability (i.e. the right people, skills and resources) to deliver the proposed programme of activity well.

4 Very good – Strong delivery to the statement

Coming from a tried and tested model I've no doubt that the organisation has the appropriate capacity and capability to deliver the proposed programme. An increase in funding would clearly increase the capacity of the team to deliver its core work and achieve the developments in the application.

Investment outcomes

FEATURE - The proposed programme of activity will deliver strongly to at least one Investment Feature Outcome

3 Good – Meets the statement

The application appears to deliver most strongly to the Investment Feature Outcome Diversity & Reach, particularly that Communities across New Zealand participate in and experience the arts. The company use Shakespeare as a jumping off point to explore different areas, different communities and different languages

PRIORITIES - The proposal delivers to an identified funding priority for this round

4 Very good – Strong delivery to the statement

The proposal speaks strongly to activities that engage or benefit underserved communities. In particular the application is geared towards young people and youth, disabled communities and LGBTQIA

General commentary:

From the outside this appears to be both a highly successful project and also one that works in a traditional way, from board down. The organisation recognises the need for development and transition but I'd have appreciated a more robust self examination of its practice and functions, or at least including such a process in the development as it transitions. In terms of access and diversity there seem to be areas at board and company level that need to be developed, allowing new voices an opportunity to shape the development of the organisation and keep it relevant to the broadest possible audience.

C. Internal assessment – Organisational financial viability

See Section 5.4 of the RFP document for more information about Assessment indicators and scoring

Overall score: 2 - Exposed

Scoring 12 out of 15 on the individual financial health assessment criteria, the organisation is perceived to be exposed to financial risk, [REDACTED]

s9(2)(ba)(i)

The organisation is solvent and a going concern.

- s9(2)(ba)(i) [REDACTED]

The organisation has the means to support itself and its proposed activities.

- s9(2)(ba)(i) [REDACTED]

The organisation's financials are well managed.

- s9(2)(ba)(i) [REDACTED]

- s9(2)(ba)(i) [REDACTED]
- The organisation does not meet the BAU reporting threshold of funding of \$75K per annum therefore CNZ does not hold previous financial health assessment records.

D. Extract of discussion relating to Shakespeare Globe Centre NZ from minutes of Strategic Advisory Panel meeting on Monday 11 and Tuesday 12 July 2022

The strong youth engagement, and positive impact on participants, strong vision about transforming lives through Shakespeare, and continued love of Shakespeare was noted.

The panel agreed that the proposal did not demonstrate the relevance to the contemporary art context of Aotearoa in this time and place and landscape.

The panel raised the following concerns:

- The proposal was not strong
- The organisation seems quite paternalistic
- This genre was located within a canon of imperialism and missed the opportunity to create a living curriculum and show relevance to the contemporary art context of Aotearoa
- The initiative relies heavily on schools who have busy calendars.

Recommendation: Not recommended for Kahikatea funding

Rationale: The proposal did not demonstrate the relevance to the contemporary art context of Aotearoa. The panel was concerned about number of theatre organisations in the round and questioned the role and relevance of Shakespeare in Aotearoa.

E. Extract of recommendations relating to Shakespeare Globe Centre NZ from paper prepared by Creative New Zealand staff for the Arts Council's consideration

Assessors scores indicate the proposal met the assessment criteria but did not offer **strong** delivery to assessment criteria with combined score of 70/100. This score comprises two scores of 34 and 36, indicating general agreement between both assessors.

While both assessors acknowledged the opportunities generated by this organisation for young people to participate and experience art, both questioned the relevance of Shakespeare in contemporary Aotearoa.

One assessor also noted a desire to understand the organisation's longer-term goals and plans, especially related to succession planning, commenting that this was an emphasis of the proposal but less visible in strategic and operational plans. This assessor suggested that succession planning and futureproofing are critically and strategically important for the organisation to mitigate observed pressures on the organisation.

This was echoed by the second assessor who noted a need for 'a more robust self-examination of its practice and functions, or at least including such a process in the development as it transitions'.

The panel also acknowledged the strong youth engagement and positive impact for participants described in the proposal but agreed that the proposal's focus did not demonstrate strong relevance to the contemporary arts context of Aotearoa.

Creative New Zealand staff note that these views do not seem to be held by the many thousands of young people who have participated in the programme over the years, and the panel did not consider the role this programme performs as an on-ramp to a career in the performing arts.

Staff identify this is one of the few proposals received with a primary focus on providing opportunities for youth participation and leadership, noting 'activities by and with youth' was an overall gap identified by the panel.

Over the course of their current funding agreement, SCGNZ has consistently met or exceeded CNZ expectations for quality and alignment, noting that as an organisation that receives <\$75k they are not required to report on financial or organisational health.

On balance, our advice about this proposal is that, s9(2)(ba)(i) all parties agree that this organisation delivers to Creative New Zealand aspirations (namely opportunities for young people to participate and experience the arts) and that a gap will be created by its exit from the Kahikatea programme. But there are concerns about the relevancy and future focus of this proposal that challenged peer assessors' confidence in the organisation's capacity to deliver **strongly**.

Recommendation: Not recommended for Kahikatea funding

F. Extract of discussion relating to Shakespeare Globe NZ from draft minutes of Arts Council meeting on 16 and 17 August 2022 (minutes to be formally approved at Arts Council October 2022 meeting)

The Council discussed the proposal and noted the assessor comments regarding concerns about the relevancy and future focus of this proposal.

The Council discussed what options were available to continue youth participation and leadership currently offered by Shakespeare's Globe Centre New Zealand. It was noted that they would be able to apply for funding under the Annual Arts Grants programme and in fact they may do better financially under this scheme. It was also noted that there are other organisations that are delivering to youth.

The Council agreed not to fund Shakespeare’s Globe Centre New Zealand through the Kahikatea programme in 2023–2025, based on them having a weaker delivery to assessment criteria than others.

Decision: The Arts Council approved the recommendation to **not** offer funding through the Kahikatea programme in 2023-2025

G. List of external peer assessors and panellists

The following external assessors were used: (listed alphabetically)

s9(2)(ba)(i)	Lynn Jenner
Anna Miles	Matariki Williams
Brent Macpherson	s9(2)(ba)(i)
Bridget Riggir-Cuddy	Michael Adams
Cameron Matamua	s9(2)(ba)(i)
Cameron Rhodes	Nick Bollinger
Charles Ropitini (Napier)	Nick Braae
Connor Masseurs	Pandora Pereira
Fale Lesa	Pip Laufiso
Feleti Strickson-Pua	Rachel Ruckstuhl-Mann
Fenn Gordon	Robin Dingemans
Grace Taylor	Seiuli Terri Leo-Mauu
Heather Galbraith	Suzanne Renner
James Wenley	Te Whenua Harawira
Jennifer King	Tihema Baker
Jeremy Mayall	s9(2)(ba)(i)
Jock Phillips	s9(2)(ba)(i)
Julie Sperring	
Karin Williams	

The following external peers formed the Strategic Advisory Panel:

Adrienne Bonell	Horomona Horo
Penny Dodd	Mina Mathieson
Matthew Goldsworthy	Dr. Tony McCaffrey
	Jessica Palalagi