

THE ANNUAL SURVEY

Guidance

National Portfolio Organisations

2018 - 2022

For completion of surveys from

April 2022 onwards

Version 3 (March 2023)

Contents

[Introduction to the Annual Survey 3](#_Toc61606897)

[Data Collection 3](#_Toc61606898)

[Contact Details 3](#_Toc61606899)

[Completing the Survey 4](#_Toc61606900)

[Section A – Organisational Profile and Workforce 7](#_Toc61606901)

[Introduction to Section A 7](#_Toc61606902)

[A1-A29: Workforce Definitions and Key Terms 7](#_Toc61606903)

[Diversity Data 10](#_Toc61606904)

[A22-A29: Board & Leadership 16](#_Toc61606905)

[A30-A33: Sponsorship & Nationality 17](#_Toc61606906)

[A34-A39: Training, Skills, & Accessibility 18](#_Toc61606907)

[Section B – Financial Statements 21](#_Toc61606908)

[Introduction to Finance Section 21](#_Toc61606909)

[B1-B2: Income & Expenditure 22](#_Toc61606910)

[B3-B11: Financial Information and Balance Sheet 25](#_Toc61606911)

[Section C – Your Funded Activity 29](#_Toc61606912)

[C1-C3: Types of Activity 29](#_Toc61606913)

[C4-C12: Number of Activities 35](#_Toc61606914)

[C13-C15: Commissions, Productions And Presentations, and Completed Residencies 39](#_Toc61606915)

[C16-C18: Objects: Loan Programmes, Collections and Digitisation 41](#_Toc61606916)

[Section D – Your Audiences 43](#_Toc61606917)

[D1-D3: Audience Numbers 43](#_Toc61606918)

[D4-D8: Live to Digital 45](#_Toc61606919)

[D9–D10: Tickets and Accessibility 47](#_Toc61606920)

[D12–D25: Social Media & Online Engagement 48](#_Toc61606921)

[Section E: Learning and Participation 50](#_Toc61606922)

[E1-E12: Learning & Participation 50](#_Toc61606923)

[Section F – International Activity & Touring 55](#_Toc61606924)

[F1-F8: International Activity and Touring 55](#_Toc61606925)

[Section G – Sector Support & Bridges 5](#_Toc61606926)8

[G1-G5: Sector Support and Bridge Organisations 5](#_Toc61606927)8

[Change Log 59](#_Toc61606930)

[Additional Questions](#_Toc61606931) 59

[Removed Questions](#_Toc61606932) 59

[Amendments of Questions 59](#_Toc61606933)

[Useful Links 6](#_Toc61606934)0

[Index 6](#_Toc61606935)4

# Introduction to the Annual Survey

Thank you for completing this survey. We’ve taken onboard feedback from last year’s submission and have made several refinements to our online platform to improve ease of use. We have also made substantial improvements to this guidance document and increased the amount of ‘in-survey-guidance’ to help you quickly find the answer to any queries. This includes reducing repetitive advice and the introduction of a question index. We are grateful for the time you spend sharing your information with us through the survey, which we use to get a good understanding of what you do, how you do it, and who benefits from it.

The survey is not an advocacy tool; we want you to complete it as honestly and accurately as you can. We will check the validity and accuracy of the data you submit, in line with the Office of National Statistics guidelines. You are required to complete a data survey.

Due to the variety of organisations across our portfolio in terms of size and output, some of the language we use in the survey might not fully align with the way you talk about your workforce, finances or activity. Please take this into consideration when completing the survey and complete the sections as best fits with your work.

## Data Collection

We have increased the frequency of automatic validation in our online system. This should mean we have fewer queries to follow up with you after submission, and should help you catch any input errors before submission. We want the data to be as accurate and usable as possible, so that we can openly share the datasets and be confident in the story we tell with your information. We want you to be able to benchmark against your peers, using the data for self-evaluation.

**Where Arts Council England funds a business plan, you should report on your entire activity. Where we are funding a specific programme plan, you should only report on that funded activity.**

## Contact Details

* For queries about the survey in relation to your organisation, please contact your Relationship Manager.
* For other queries specifically relating to the annual survey data return, please e-mail [NPO.Survey@artscouncil.org.uk](mailto:NPO.Survey@artscouncil.org.uk).

## Completing the Survey

### First Steps

Collecting all the data for the annual survey, and manipulating it into the format required for submission, can be a daunting process.

We recommend that this process begins long before the survey opens. The survey window is best used to submit your data and check for any errors – if you’re only beginning to gather the required information towards the end of the submission window, you will likely find the process a lot more stressful.

We produce an Excel template which matches the format and order of the online questions – you can use this to collect the data you need and have it ready for submission. This will also mean you can note any queries ahead of the very busy submission window which will help our team, or your relationship manager dedicate more time to guiding you through the process.

You can find the Excel template on our website:

<https://www.artscouncil.org.uk/our-data/our-npos-and-annual-data-survey>

*Why do I need to submit data online that I already have in a spreadsheet?*

We have 852 NPOs and a dedicated survey team of 3.

Collecting data through Excel inevitably means people will make changes – add a row here, move this figure over there, or type a comment here where we’re expecting a number. We do not have the resources needed to collect, merge, and validate responses if we collected them all in this way. All submissions must be made online to ensure compliance with the terms of your funding agreement.

Submitting through an online portal means that we receive the data in an ordered and usable format. Most typos or human errors can be easily spotted and flagged by validation rules rather than us having to come back to you weeks later to verify a very specific response. It may seem like a hassle in the short term, but in the long term it saves all of us time and improves the accuracy of the data we collect.

### Online Credentials

We will send an email on 1st April containing a bespoke link and password for this year’s survey. This will be sent to your main contact on Grantium – it is therefore vitally important that these contact details are kept up to date. Separate guidance for doing this is available online, and our Customer Services team are always ready to assist you if you are unsure of how to do this.

You can then log into the survey using your Applicant Number and the password.

Your log in credentials can be shared within your organisation (you may have a different person or department completing the Workforce section compared to the Finance section, for example).

Whilst you can use multiple devices to access the survey, it is important to **ensure** **only one active session is in progress** at a time. When a second person logs in using your credentials, the first user’s session will be terminated, and any data entered on the page they were working on will not be saved.

If more than one person is working on your submission, we recommend that you plan when each individual will be working on your submission.

### Navigation

The annual survey is split into ‘blocks’. These are groups of similar questions such as Permanent Staff, or Income & Expenditure. Each block is self-contained and will likely be completed in one sitting by one person.

Each block may contain one or more ‘pages’, and each page may contain several questions – we’ve tried to find a happy medium whereby each page doesn’t contain too many questions, and each block doesn’t contain too many pages. This hopefully makes completing the survey more manageable as it can be tackled in bitesize chunks, each with a clear and particular focus.

Generally speaking, each page will have three buttons at the bottom. Providing there are no validation issues to address, “Save & Continue” will move you on to the next page of the survey. If you’ve entered invalid data, such as text in a numeric field, an error message will display, and you will be prevented from completing the page until it is resolved.

The “Back” will return you to previous page, you will see a warning that progress will not be saved. Any information you have entered should be retained, however the page will not be considered complete until “Save & Continue” has been clicked and no errors have been found. Similarly, the “Contents” button will return you to the Table of Contents page but will not mark the current page complete.

Once you have completed all pages in a block, it will be marked with a tick on the Table of Contents – you can still click back into that section and modify your answers if needed. All blocks must be completed before you can submit the survey.

When you log in to the survey it should open where you left off – this is also true of blocks. If you begin Income & Expenditure for example, the first page will ask about your income, should you complete this you’ll be taken to the next page, Expenditure. If you then leave the block and start working on something else, Activity for example, when you return to the Income & Expenditure block you’ll begin on the expenditure page. The Income page can still be accessed using the “Back” button.

### Sign-off and Submission

At the end of the survey there is a confirmation checkbox to verify that you have checked and submitted the information provided and that this has been signed off by your board.

The survey will automatically produce a PDF copy of your responses on submission. It is up to you to download this. You should not rely on this PDF as a record of submission – your data should be stored offline in your own systems, or in the Excel template should you need to refer back to any information in the future.

### Validation

Most of the validation should happen as you complete the survey – error messages will help solve any problems. Following the survey submission deadline, the survey team review the information received. We will query any outliers, unexpected values, or missing information in your submission over the summer.

Please use the contact details form at the end of the survey to provide the best email address for these queries.

# Section A – Organisational Profile and Workforce

## Introduction to Section A

The Workforce section is split into 6 sub-sections, and collects data on permanent, contractual and voluntary staff, as well as your board and senior leaders.

## A1-A29: Workforce Definitions and Key Terms

### Contract Types

We will ask you to break down the total number staff employed according to the contract type you have with them. These contract types are described in the table below.

|  |  |
| --- | --- |
| Contract Type | Definition |
| Permanent Staff | Staff employed on permanent contracts as at 31st March 2022. Permanent staff who have left the organisation before this date should not be counted regardless of their length of service. Please count staff on fixed term contracts of 52 weeks or more as permanent. |
| Contractual, Freelance, and Commissioned Staff | Provide details of all Contractual, Freelance, and Commissioned Staff who have worked for your organisation at any point between 1st April and 31st March inclusive.  This includes temporary staff hired for a specific programme on a short-term contract, e.g. consultants and those self-employed. If an individual was hired more than once in the reporting year, please only count them once.  Do not include staff hired through a third-party company, only include individuals which your organisation directly contracted. |
| Voluntary | Refers to those who receive no wages or salary, or who receive no more than basic expenses, for example travel costs. Please include details of all individuals who have volunteered for your organisation at any point between 1st April and 31st March. |
| Paid Internships | Please do not include Paid Internships in any of the above categories – this information will be collected separately in question A22. |

### Staff Type Definitions

Each member of staff should only be represented once. Once you have assigned an employee to a category, please ensure that you assign them consistently throughout the rest of the questions. Where indicated, totals should be the same in all tables.

|  |  |
| --- | --- |
| Specialist staff | Refers to those working within an area of artistic specialism. This includes directors, choreographers, producers, programmers, curators, conservators etc., and includes the artistic/museum director. This category also includes educational, marketing and audience development staff. |
| Managers | Refers to executive or senior management staff, for example chief executive, executive director, finance director, chief accountant, general manager, human resources manager and legal advisor. |
| Artists | Refers to artists, dancers, actors, singers, musicians, writers, composers and designers, as well as any other producing artists. |
| Other Staff | Refers to both administrative and technical staff, for example finance, reception, box office or ticketing staff, and lighting or sound technicians. |
| Board/governing body | Refers to elected or appointed members who oversee your organisation’s activities. |

The Survey will automatically alert you when the total number of a staff type does not add up. For example, if you enter 6 Specialist Staff in the Ethnicity Table, and 5 in Disability – the survey will flag this as an error and prompt you to re-enter details.

### Agency & Third-Party Staff

We will ask you about the members of staff that your organisation employs. Please note – if you work with individuals sub-contracted through a third party, such as a recruitment agency, their details should not be included.

### Staff with Multiple Positions

It is possible that over the past year a member of staff has held multiple positions, spanning more than one Staff or Contract Type. In such cases, please only count that staff member once, using their position as at 31st March. If they hold multiple posts at this date, assign them to the role which commands greatest use of their time or skills.

### Not Known or Prefer Not to Say?

We appreciate that on rare occasions, it is not possible to collect some staff information. In these cases, you should record those staff as “Not Known”. “Prefer Not to Say” should be available to all respondents to indicate where they do not wish to identify as any of the available categories. Only when a response has not been recorded, or the question hasn’t been asked, should that person be counted against “Not Known”.

### Full & Part Time Staff

In some parts of the workforce section we will ask for figures to be separated into full time & part time. We consider full time staff to be those contracted to work 35 hours per week or above. Those working fewer hours than this per week should be considered part time.

## Diversity Data

We are committed to having an accurate picture of the diversity of our national portfolio. Therefore, there are questions about ethnicity, disability, age, gender and sexual orientation in this survey. We use this data to compile our annual Diversity report, including breakdowns of the organisations that employ 50 or more permanent staff.

The information must be obtained through official monitoring exercises and held confidentially. It should not be based on assumptions or informal knowledge. We will never release information that could potentially identify individuals by any characteristic. We expect our organisations to safeguard the confidentiality of all staff regarding any personal information. If you are conducting any staff surveys, or introducing new monitoring for new staff, please reflect this in your answers. We ask for this information because we want to better capture and understand the diversity, both visible and invisible, of the workforce in the sector.

We will treat this information in confidence and release data in an aggregated format or, as part of our commitment to open data and the General Data Protection Regulation (GDPR), anonymised - where individuals could be identifiable. Usually, where workforce is concerned, we will anonymise where less than five individuals are counted in a category.

### Gender Diversity

Relating to Question(s): A2, A9, A15, A22

We collect data on gender identity. This includes non-binary, for those whose gender identity does not conform to conventional notions of male and female. We also ask how many of your staff identify as a gender which is different to that assumed at birth.

In the case of Permanent, Contractual, and Volunteer Staff – you will be asked to enter the number of Full Time and Part time staff separately. Gender identity of the Board or Governing Body should simply be entered in total.

Each Gender Diversity question will ask you to:

*Please complete the table to show the gender identity of the [Contract & Full/Part Time] staff in your organisation.*

* Female (including trans women)
* Male (including trans men)
* Non-Binary (for example, androgyne)
* Prefer not to say (staff member has chosen to not disclose their gender identity)
* Not known (staff member has not had the opportunity to disclose this information)

You will also be asked:

*Please give, where known through official monitoring channels, the number of staff whose gender identity is different to the sex they were assumed to be at birth.*

This figure should relate to all staff within that contract bracket regardless of Staff Type.

### Age

Relating to Question(s): A3, A10, A16, A23

We ask how many of your staff fall into five age brackets. Age should be reported as at 31st March. As with other diversity characteristics, all staff should be given the option not to disclose this information (indicated by Prefer Not to Say). Where a member of staff has not been asked, they should be counted as Not Known. The categories to report against are as follows:

* 0-19 (Under 20 years old)
* 20-34 years old
* 35-49 years old
* 50-64 years old
* 65-74 years old
* 75+ years old
* Prefer Not to Say
* Not Known

### Disability

Relating to Question(s): A4, A11, A17, A24

We work to the concept of the Social Model of Disability. The social model of disability was developed by disabled people in the 1970’s and its basic principle states that people with impairments are disabled by society and its structures, organisational practices and barriers in the environment; these factors are socially constructed and lead to a complex and institutionalised system of barriers which has a negative and discriminatory impact on disabled people.

* Disabled
* Non-Disabled
* Prefer Not To Say
* Not Known

Along with the above breakdown we will also ask the additional question:

*Please enter the number of Part Time staff that identify as having a disability or impairment.*

This is a single answer for each Contract Type – irrespective of Staff Type. Our definition of Part Time is anyone who is contracted to work fewer than 35 hours per week.

### Neurodiversity

Relating to Question(s): A4, A11, A17, A24

We have introduced new questions this year which follow the Disability questions in each workforce section. Please only complete this data if known.

We ask for the number of neuro-divergent individuals under each Contract Type, and for each Staff Type. Our definition of Part Time is anyone who is contracted to work fewer than 35 hours per week.

### Ethnicity

Relating to Questions(s): A5, A12, A18, A25

We use the Office for National Statistics’ (ONS) definitions for ethnicity categories in England and Wales, to have a dataset that is consistent with other sectors and population data. This allows us to better understand your organisation and the people your work involves, and how this compares with national trend analysis. Further details of the ethnicity groups, including information on how they were chosen and related statistics:

<https://www.ethnicity-facts-figures.service.gov.uk/ethnic-groups>

Along with those identifying in the given ethnic groups, please also report the number of your staff who “Prefer Not to Say”, and those who have not been given the opportunity to respond as “Not Known”.

White

* English / Welsh / Scottish / Northern Irish / British
* Irish
* Gypsy or Irish Traveller
* Any other White background

Mixed / Multiple ethnic groups

* White and Black Caribbean
* White and Black African
* White and Asian
* Any other Mixed / Multiple ethnic background

Asian / Asian British

* Indian
* Pakistani
* Bangladeshi
* Chinese
* Any other Asian background

Black / African / Caribbean / Black British

* African
* Caribbean
* Any other Black / African / Caribbean background

Other ethnic groups

* Arab
* Latin American
* Any other ethnic group

Non-Specified

* Prefer Not To Say
* Not Known

### Sexual Orientation

Relating to Question(s):A6, A13, A19, A26

We collect data on sexual orientation.

In the case of Permanent and Contractual Staff, Volunteers, and Board or Governing Body members, you will be asked to complete a table to indicate how many of your staff describe their sexual orientation as each of the below options. There is no need to consider full or part time – all staff should be included together.

* Bisexual
* Gay Man
* Gay Woman (or lesbian)
* Heterosexual (or straight)
* Queer (or none of the above)
* Prefer Not To Say (respondent has chosen to not disclose their sexual orientation)
* Not Known (respondent has not had the opportunity to disclose this information)

We understand that your staff and volunteers may not have been offered the Queer option – please include all responses regardless of whether this option was available to them.

There is no need to consider full or part time – all staff should be included together. The survey will alert you if you have entered a total number of any staff type which did not equal the previous response provided to Gender Identity.

### Socio-Economic Background

Relating to Question(s): A7, A27

Following a 12-month period of extensive research and consultation, we are introducing a question to capture the socio-economic background of the workforce in the sector. This is so we can better understand access to the arts and culture and what barriers there may be. The research that was carried out can be found here:

<https://livingwithdata.org/whats-new/measuring-social-mobility-in-the-creative-and-cultural-industries/>

The chosen metric is in line with that adopted by other cultural organisations and will give us a benchmark for the sector which we can build on in the future. Is. Please only complete this if you can, and do provide us with feedback on its introduction to your organisation. From next year you won’t be able to skip over this question (although you won’t have to supply data, there will be an option for those who are not yet collecting it), so do let us know if you need any help introducing the collection.

We know this is a new measure and may be difficult for you to introduce. Please see the Jerwood Arts Toolkit for more information and advice:

<https://jerwoodarts.org/projects/weston-jerwood-creative-bursaries-2017-19/toolkit/>

This is the start of the conversation, so we’re keen to hear from you about how it’s working. We are only requesting this information from your Permanent staff and Board. The question is phrased as follows:

Please enter the number of staff by occupation of the main/highest income earner in their household when they were 14.

Modern Professional Occupations

*E.g. Teacher/lecturer, nurse, physiotherapist, social worker, welfare officer, actor, artist, musician, police officer (sergeant or above), software designer*

Clerical and Intermediate Occupations

*E.g. secretary, personal assistant, clerical worker, office clerk, call centre agent, nursing auxiliary, nursery nurse*

Senior Managers and Administrators

*Usually responsible for planning, organising and co-ordinating work for finance such as finance manages, chief executive etc*

Technical and Craft Occupations

*E.g. motor mechanic, fitter, inspector, plumber, printer, tool maker, electrician, gardener, train driver*

Semi-Routine Manual and Service Occupations

*E.g. postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, receptionist, sales assistant*

Routine Manual and Service Occupations

*E.g. HGV driver, van driver, cleaner, porter, packer, sewing machinist, messenger, labourer, waiter/waitress, bar staff*

Middle or Junior Managers

*E.g. office manager, retail manager, bank manager, restaurant manager, warehouse manager, publican*

Traditional Professional Occupations

*E.g. solicitor, accountant, medical practitioner, scientist, civil/mechanical engineer*

Self-employed

Short Term Unemployed

*Claimed Jobseeker’s Allowance or earlier unemployment benefit for a year or less*

Long Term Unemployed

*Claimed Jobseeker’s Allowance or earlier unemployment benefit for more than a year*

Retired

Not applicable

Don’t know

Prefer not to say

Other – please specify

### Volunteer Hours

Within the Voluntary section of the survey we will also ask for the total Volunteer Hours. This should be entered as a single, cumulative number of all the hours contributed by all volunteers in your organisations. Any hours contributed by your board members should not be included in this total.

## A22-A29: Board & Leadership

Within the Board & Governing Body Section we also ask some additional questions to better understand your organisation’s leadership.

We ask you to consider your organisation’s mission and objectives and identify where you consider your organisation to be diverse led as follows.

|  |  |
| --- | --- |
| BME led | If your organisation defines itself and its mission as being Black or Minority Ethnic led, please answer ‘yes’ to this question. |
| Disability led | If your organisation defines itself and its mission as being disability led, please answer ‘yes’ to this question. |
| LGBT led | If your organisation defines itself and its mission as being lesbian, gay, bisexual or trans (LGBT) led, please answer ‘yes’ to this question. |
| Female led | If your organisation defines itself and its mission as being female led, please answer ‘yes’ to this question. |

Please note, for analysis purposes, we may monitor the numbers of your management and board that are counted within the above diversity characteristics and base our reporting on these figures as an evidence-based dataset rather than your response to this question.

We also ask for broader diversity characteristics of those staff in three key leadership positions. Please be assured that we will treat the responses in complete confidence within the Survey Team – these will not be shared outside of this team except in aggregated format.

The individuals reflected in this question should represent the highest level of seniority within your organisation – for many organisations this will be the Chief Executive, Artistic Director, and Chairperson. However, we recognise that organisational structures vary greatly. Please do not double count an individual, for example, if your Chief Executive also takes on the role of Artistic Director, please assign them to the role that takes up the greater part of their time and provide an alternative senior position as a second leadership post. Use the text boxes to tell us the positions you have completed for.

|  |  |
| --- | --- |
| Disability | Disabled, Non-disabled, Prefer Not To Say, Not Known |
| Ethnicity | White British or Irish, Any Minority Ethnicity, Prefer Not To Say, Not Known |
| Gender Identity | Female, Male, Non-Binary, Prefer Not To Say, Not Known |
| Sexual Orientation | Heterosexual/Straight, LGBQ+ (Any Other Sexuality), Prefer Not To Say, Not Known |

## A30-A33: Sponsorship & Nationality

This section provides us with additional information on the Nationality of the staff you employ. This allows us to examine how our organisations attract talent from overseas. Previous surveys contained additional workforce questions as part of the International Activity Section. These have now been relocated to this section to keep all Workforce questions contained within Section A.

### Sponsorship

There are two questions about visa sponsorship – the first is a Yes/No question:

*Between 1 April and 31 March did your organisation hold a UK Border Agency (UKBA) Sponsor Licence, enabling it to sponsor migrant workers under the points-based system*

A UKBA licence enables organisations to sponsor migrant workers under the points-based system. The data from this question will help us to understand to what extent the arts and museum sectors bring in international talent. Should you answer ‘Yes’ this will then be followed up with the question below:

*How many certificates of sponsorship did your organisation issue between 1 April and 31 March under the following tiers: Tier 2, Tier 5.*

### Non-UK Nationals

This section relates only to Non-UK nationals – an individual who holds multiple nationalities including citizenship of the United Kingdom should not be included below in these totals. This section contains two questions:

*How many EU nationals were employed by your organisation between 1 April and 31 March?*

*How many non-EU nationals were employed by your organisation between 1 April and 31 March?*

Please split this between paid staff and volunteers. If a person was employed across two periods of time in the year, please only count them once, giving preference to paid employment if an individual also volunteered. If you did not employ any foreign nationals, then please enter 0.

A full list of European Union member countries can be found on the EU’s website:

<https://europa.eu/european-union/about-eu/countries_en>

## A34-A39: Training, Skills, & Accessibility

### Internships, Apprenticeships, and Work Experience

Relating to Questions(s): A34

We will ask you how many people have taken part in the following training/up-skilling and work experience schemes. Where you did not offer the scheme, please check the “Not Offered” option.

Indicate whether your organisation offered the following schemes between 1 April and 31 March of the reporting year and how many of these led to employment within your organisation:

|  |  |
| --- | --- |
| Paid internships | This refers to paid internships or work placements offering work experience, allied to training that may include in-house programmes devised by the hosting or partner organisation(s). |
| Unpaid internships | This refers to unpaid (except for travel/subsistence costs) internship opportunities or work offering work experience, allied to training that may include in-house programmes devised by the hosting or partner organisation(s). |
| Formal apprenticeships | This refers to on the job training leading to nationally recognised qualifications, usually NVQs, developed by industry and delivered in partnership with further education colleges. The National Apprenticeship Service supports, funds and co-ordinates the delivery of apprenticeships throughout England. |
| Unaccredited apprenticeships | This refers to on the job training that is not linked to nationally recognised qualifications. |
| Work experience | This refers to students in school, further education or higher education working in an organisation alongside staff for short periods of time, usually set up through schools/colleges, local business partnerships or informal contacts. |

### HR Policies

Relating to Question(s): A35-A39

This section will ask you questions around training, skills, and accessibility provided to your existing staff and volunteers.

Most of the questions require only a Yes/No answer:

*Do you offer quiet spaces/prayer rooms for staff?*

*Do you have an induction package for new staff?*

*If so, does this include Equality & Diversity Training?*

*Do you carry out an access audit for new starters to establish whether all equipment is accessible for staff, and so adjustments can be made where necessary?*

*Does your organisation offer a professional development scheme to existing staff?*

We also want to know if you offer flexible working patterns to your staff.

We recognise that many staff may have roles linked to shift rotations or opening/closing times where some flexible patterns are not possible. Please indicate if your organisation offers the following schemes to all staff where possible.

Please do not include flexible patterns only offered by exception or in special circumstances.

|  |  |
| --- | --- |
| **Term** | **Definition** |
| Annualised Hours | Staff have complete control over their hours and account for these against an annual time quota. |
| Compressed Hours | Staff can work more hours on some days to free up time elsewhere in the week or month. |
| Flexible Start/End Times | Staff may start/finish at a time which suits them providing they meet their daily hour quota (includes Core Hours schemes). |
| Flexible Working Days | Staff may choose their days off rather than stick to a rigid weekday/weekend structure. |
| Job Share/Part-Time Reduction | Staff can reduce their hours by entering a job share where appropriate/possible. |
| Shared Parental Leave | Parental leave can be split/shared between both parents. |
| Remote Working | Staff can work from home or another location outside of your organisation’s premises. |
| Time Off In Lieu (TOIL) | Staff can save or bank overtime to recoup additional leave at a later date. |

# 

# Section B – Financial Statements

## Introduction to Finance Section

The finance section is divided into two sections in the survey: Income & Expenditure and Financial Information & Balance Sheet. The figures we require are all at a summary level of detail. This allows us to assess the financial health of the portfolio and make reasonable comparisons across different organisation cohorts and over time.

The information you provide should relate to all activity that your organisation or subsidiary has engaged – not just that which is funded by Arts Council England.

However, if your organisation is a **subsidiary** or is operated by a parent organisation (such as a Local Authority or university) with a separate operational business plan, please only report on the funds utilised by your subsidiary organisation, not the parent.

### Financial Year

Arts Council England collects information on the financial year from 1st April to 31st March. We report on our activity and funding on that basis and funding for organisations is the most significant part of our annual investment. For these reasons, and more besides, National portfolio organisations **must** report on an April to March basis, irrespective of their own financial year.

This does not necessarily mean that an organisation with a different financial year must prepare their information from scratch. Providing you can make appropriate assumptions to generate April-March information, you may do this.

Record the basis for the calculation as additional information at the end of the Financial Information and Balance Sheet section, question **B11.**

### Actual/Provisional & Statutory Accounts.

We will ask you to provide two sets of figures, one for the year just ended, and one for the year prior to that. These are defined as *Actual or Provisional* and *Statutory or Certified* accounts.

***Statutory accounts:*** *Please complete financial information for the previous year from your statutory (e.g. certified or audited) accounts. This should be the period* ***1 April 2021 to 31 March 2022****.*

***Actual/Provisional accounts:*** *Please provide data that is as accurate as possible for the reporting financial year, using statutory accounts where available, or provisional accounts. This should be the period* ***1 April 2022 to 31 March 2023.***

## B1-B2: Income & Expenditure

The Income and Expenditure section consists of two tables. Totals and subtotals will be automatically calculated for you as you enter information.

### Income

*Relating to question(s):B1*

Please pay particular attention to rows beginning “*Of which”*, these are extracted figures which should be included within another figure.

For example, if you ran two educational activities, one aimed at adults and one aimed at children, and both generated £500 income, we would expect to see the Educational Activity shown as £1,000, and the “*Of which CYP”* figure entered as £500.

The following tables detail definitions of the terms used in the Income table and examples of what should be included.

#### Earned income

|  |  |
| --- | --- |
| Core activity | Please give the figure for income generated by your core activity. This should include box office receipts; engagement and other fees; entrance charges for exhibitions, screenings, readings and other activities, sales of books and magazines if core activity; and workshop fees etc., where such events form your core activity.  All income from sales should be entered excluding VAT.  If your organisation’s core activity is educational activity, please complete all core income within the educational activity boxes and enter £0 here. |
| Educational activity | Give details of the income generated from educational activity or events, in addition to core activity. Educational activity is about learning skills and techniques and gaining knowledge and appreciation of arts, museums and culture. It can also include using arts and culture to develop in other areas such as personal and social skills or history. |
| *Of which, Children and young people specific* | *Of the figure entered in educational activity, please state how much of this came from activities specifically targeted at children and young people (0-19).* |
| Supplementary activity | Give details of income generated from trading activity, for example catering (excluding VAT), membership schemes, secondary sales, as well as bank interest and any other earned income. |

Of your total Earned Income,

|  |  |
| --- | --- |
| *Of which, International earned income* | *Of the total amount of earned income, please state how much of this was earned internationally, for example through international touring and ticket sales* |
| *Of which, International inward investment* | *Of the total amount of earned income, please state how much of this came from international investment into your organisation, for example through partnership or collaborative working* |

#### Arts Council England investment

This section collects details on funding from Arts Council England.

|  |  |
| --- | --- |
| NPO funding | Give details of the total NPO funding grant received from Arts Council England. This field should be pre-populated with the figure taken from our records. If this differs from the figure you have, please contact your Relationship Manager. |
| Other Arts Council investment | Give details of any other Arts Council investment received. This could include one-off project grants, development projects, other revenue awards or capital investment, from both Lottery and Grant in Aid sources. |

#### Contributed income

|  |  |
| --- | --- |
| Sponsorship | Give details of any sponsorship from business organisations as well as income from corporate member schemes. |
| Fundraising events | Give details of any income generated through specific fundraising events held by your organisation. |
| Trusts | Please include all money received from trusts, foundations and legacy bequests. |
| Donations – regular giving | Please give details of money received through regular giving. May include membership or friend schemes for which no benefit is received in return. |
| Donations – one off gifts | Include all money received from the general public or friends for which no benefit is received in return. |
| *Of which, Gift Aid:*  *(Optional, provide only if needed)* | Of your total contributed income, what was the value of Gift Aid claimed?  This is the value of Gift Aid claimed in the financial year between 1st April & 31st March. The date of associated donations need not be considered. |

#### Other public investment

|  |  |
| --- | --- |
| Local authority grants | Total investment received from Local Authorities/Local Government. |
| *Of this, capital funding* | *Of the total Local authority grants, please state how much of this was given for capital purposes* |
| Other public grants | Include grants from other arts and culture funding bodies, grants from universities or research boards, health trusts, local economic partnerships (LEPs), including revenue and/or development funding |
| *Of this, capital funding* | *Of the total Other public grants, please state how much of this was given for capital purposes* |

### Expenditure

*Relating to question(s): B2*

We ask that you complete a single, simple table in relation to your expenditure. This should include expenditure which has occurred during the last financial year between 1st April and 31st March. Salaries should be proportioned to the most relevant expenditure line.

|  |  |
| --- | --- |
| Artistic programme or other main activity | Please enter the total costs of your artistic programme or main activity. If your organisation’s core activity is education, please complete all core income within the educational activity box and enter £0 here. |
| Marketing | Enter the total costs of your marketing activity |
| Education programme | Enter the total costs of your education programme, where relevant |
| Overheads | Enter the costs of overheads, such as administration costs (post, telephone, insurance, etc.) and premises costs (rent, heating, lighting, etc.) |
| Generating funds | Enter costs of involved in generating funds (for example, costs involved in fundraising programmes and processing donations/legacies) |
| Governance | Enter costs involved in developing your governance strategy and the oversight of your organisation. |
| Other costs | Enter other costs not included above, including irrecoverable VAT |
| Collections – care and conservation | Enter the separate costs that are directly involved in the care and conservation of collections. (Enter £0 if not applicable) |
| Collections – acquisitions | Enter the separate costs that are involved in the acquisition of collections. (Enter £0 if not applicable) |

## B3-B11: Financial Information and Balance Sheet

This section lets us check some basic administrative details about your organisation, before further financial figures from your balance sheet, reserves, and tax relief where appropriate.

At the end of this section there is space to add any notes or commentary – this is entirely optional and should only be used where a major adjustment or alteration has occurred in your finances which would likely be flagged in our validation process. This could be a change in definition of a large fund, or substantial change in spending due to biennial activity for example. If you have made any adjustments, or assumptions around some of the figures entered (such as conversion of figures to April to March financial year) these should be noted in B11.

### Financial Information

*Relating to question(s): B3, B4, B5, B6, B7*

The first page in this block of questions will ask you some simple yes/no or multiple-choice questions. These are hopefully self-explanatory and shouldn’t take long to answer, however if you have doubts or queries please don’t hesitate to get in touch with us directly or reach out to your relationship manager for advice. Some additional advice is included below each question below.

*B3: Do any of your organisation’s board members offer financial support?*

This includes monetary or in-kind support, over and above regular board or committee meetings. For example, a solicitor sitting on your board may offer free legal advice.

*B4: Are you a local authority or a local authority-run venue?*

If you are a local authority or a venue run by a local authority, answer ‘Yes’ to this question.

*B5: Are you a registered charity? This includes university museums.*

If you are a charity registered with the Charities Commission answer ‘Yes’ to this question. If not answer ‘No’.

*B6: Does your organisation claim gift aid (where possible) on donations?*

Please indicate if you are claiming gift aid, and to what extent.

The final question on this page, **B7**, will ask you if you have a balance sheet. If you select “No” the survey will skip ahead to the Analysis of Funds section which asks about your reserves position, otherwise the survey will first display the balance sheet.

### Balance Sheet

*Relating to question(s): B8*

As with the Income and Expenditure tables, the Balance Sheet is split into Statutory (relating to your balance sheet at year end 2021/22) and Actual (relating to 2022/23) columns.

The balance sheet is arranged into four sections as shown:

Fixed Assets

* Intangible Assets
* Land and Buildings
* Tangible Assets (apart from Land and Buildings)
* Investments – Fixed

Current Assets

* Inventory and work-in progress
* Debtors
* Investments – Current
* Cash at bank and in hand

Current Liabilities

* Creditors: amounts falling due within one year

Long-term Liabilities

* Creditors: Amount falling due after more than a year
* Provisions for liabilities and charges
* Defined benefit pension scheme

There are several calculated rows in the Balance Sheet – these should allow you to sense check the information entered to ensure it matches your records. Along with totals for each section, Net Current Assets provides Current Assets less Current Liabilities, and Total Net Assets will calculate the total of Current and Fixed Assets less Current and Long-term Liabilities.

### Analysis of Funds

*Relating to question(s): B9*

The analysis of funds tab will grant us greater insight into your reserves position

|  |  |
| --- | --- |
| Endowment funds | Endowment funds are restricted assets held to benefit an organisation long-term. The assets can be permanent or expendable and are often held to generate income which can be spent. |
| Restricted funds | Restricted funds are those funds that are donated or granted for specific purposes stated by the funder and which must only be expended for these purposes. |
| Unrestricted funds: designated funds | Designated funds are those unrestricted funds that are designated by the organisation itself for a specific purpose and as such the designation can be removed. Where a funder expresses a preference for the use of funds but does not set a requirement, this can also form a designated fund |
| Unrestricted funds: undesignated funds | Undesignated funds are unrestricted funds that are not designated for a particular expenditure and can be used for any purpose. |

### Tax Relief

*Relating to question(s): B10*

We expect tax relief to be incorporated in the relevant section of your financial statements above. In order to monitor the level of relief being claimed by the portfolio, we ask you to isolate the amounts here. This should not affect any other information provided which should include all tax relief claimed as aligned to your financial statements.

|  |  |
| --- | --- |
| Creative Industries Tax Relief | Please tell us the total value of [creative industries](https://www.gov.uk/guidance/corporation-tax-creative-industry-tax-reliefs) tax relief paid in each year.  This should not include tax relief claimed/pending but not received. Tax relief relating to activities in previous financial years, but received in this year, should be included. |
| Other Tax Relief | If your organisation has received any other form of tax relief, please provide this here.  This should not include tax relief claimed/pending but not received. Tax relief relating to activities in previous financial years, but received in this year, should be included. |

# Section C – Your Funded Activity

In this section, we’d like to know more about the scale and type of activity delivered against our investment. We use it to identify trends and possible areas for development, which may feed into policy decisions. We also use it to report aggregated activity to other bodies (e.g. DCMS), and to complete our annual [Official Statistic](http://www.artscouncil.org.uk/annual-submissions-report).

***Where Arts Council England funds a business plan, you should report on your entire activity. Where we are funding a specific programme plan, you should only report on that funded activity.***

## C1-C3: Types of Activity

This question block will ask you to select the types of activity you are reporting against. It must be completed before Number of Activities and Audience Numbers – this is so we don’t ask you irrelevant questions.

### Programme Focus

*Relating to question(s): C1*

The first question in this section will ask you about your programme focus.

|  |  |
| --- | --- |
| Major focus | the activity represents 50% or more of your agreed programme |
| Minor focus | there is specific activity, however it is less than 50% of your agreed programme |
| Not applicable | your agreed programme does not include specific focused activity for these groups |

If activity is focused across two groups, for example a major focus of your work is aimed at Black and minority ethnic and older people, record major under both groups.

### Location of Activity

*Relating to question(s): C2*

We want to know where your activity is primarily taking place. This question takes the form of two dependent dropdowns (the options available in the second “Sub-Classifier” box, depend on what you select in the “Classifier” box.

There is also the option to add a second site – please use this only if your activity was split equally across two different types of site (if it was split between two sites of the same type, there is no need to add a second).

A full list of options is shown below with the primary, or parent, classifiers shown in bold and underlined.

|  |  |  |
| --- | --- | --- |
| **Arts/cultural building** |  | **Outdoor** |
| Artist’s studio |  | Heritage site |
| Arts centre |  | Private Outdoor Space (e.g. garden) |
| Cinema |  | Public park |
| Concert hall/music venue |  | Rural open space (not park) |
| Gallery |  | Urban street or open space (not park) |
| Library |  | Rural open space (not park) |
| Museum |  | Urban street or open space (not park) |
| Opera House |  |  |
| Retail |  | **Product** |
| Theatre |  | Audio recording |
|  |  | Digital file |
| **Broadcast & digital distribution** |  | Object or artefact |
| Online |  | Publication |
| Radio broadcast |  | Video recording |
| Television broadcast |  |  |
|  |  | **Residential** |
| **Commercial building** |  | Care home/hostel |
| Catering/bars |  | Hotel |
| Industrial/business |  | Prisons & penal institutions |
|  |  | Private home |
| **Other public building** |  |  |
| Civic |  | **Other** |
| Community |  | Other |
| Faith buildings |  |  |
| Health |  |  |
| Schools & colleges |  |  |
| Universities & higher education |  |  |

### Activity Types

*Relating to question(s): C3*

The final question in this block will ask you to select the activity types your organisation used to show or deliver work. Consider the activities you completed last year, for each distinct activity, and think which of our type definitions it falls under.

Where an activity arguably involves multiple activity types - an exhibition which involves a film screening on a loop for example; think about what that activity primarily is. In this example the activity would be classed as an Exhibition. You should therefore ensure that Exhibitions is selected in this question. If your organisation has not conducted any film screenings for which the screening is the primary activity, then Film Screenings should not be selected in this case.

Please be aware that the Live to Digital questions in Section D can be used to capture secondary distribution of your activities through digital means, for example, screenings of recorded performances or online experiences of exhibitions. In this section, each activity should be recorded as per its primary distribution model.

If you are a development organisation only and have not produced any work under the main artistic categories, please select ‘Development’ to complete the section.

As this question dictates what we will ask you in the rest of the survey, it is important that it is answered accurately. Below you will find full definitions and examples of each activity type. If you are unsure of how a particular activity should be recorded, please contact your relationship manager or the NPO Survey Team directly.

#### Physical Audiences

The following Activity Types specifically relate to times when the audience is physically present to experience the activity. Where an event with physical audiences is also viewed or streamed elsewhere (e.g. in a cinema or online), additional details will be captured in the Live to Digital section.

|  |  |
| --- | --- |
| Performances/ Events | **Description:**  A performance is a single, time limited event involving physically present artist(s), or presenter(s) / speaker(s) / producer(s) etc., viewed by a physical audience as it occurs.  **Examples:**  Activities where a performance takes place, for example: theatre productions, dance pieces, concerts, readings, lectures, or museum performance events.  **Exclusions:**  Please do not include performances which were created purely for online or broadcast consumption, as they will be captured in either ‘Broadcasts’ or ‘Web-based activity’ – for example a television show filmed in front of a live studio audience should be recorded as Broadcast activity, not Performance  Do not include activity performed as part of a festival or carnival where there are multiple performances occurring at the same time and location – i.e. where the audience is not specific to an individual act or performance (such as a music festival).  NB: An event which is simply “badged” as being part of a festival, but is itself an isolated event, should be included here. |
| Exhibitions | **Description:**  An on-going installation or display of items of interest. An exhibition can be thought of as something to visit rather than an event to attend.  **Examples**  Visual Arts, soundscapes, museum collections etc. An exhibition can be permanent, temporary or touring.  **Exclusions**  Please do not include any exhibitions that were part of a wider festival or carnival occurring at the same time and location – i.e. where the audience is not specific to the exhibition alone.  NB: An event which is simply “badged” as being part of a festival, but is itself an isolated event, should be included here. |
| Festivals | **Description:**  A festival is defined here as a culmination of activities occurring in the same time and place, where the audience of each specific element cannot be clearly differentiated from other parts.  **Examples:**  Large music festivals with multiple acts performing on one or more stages, pop-up exhibitions occurring alongside other artistic activities, street carnival with no clear demarcation between individual activities.  **Exclusions:**  Individual activities which may form part of a festival programme but are independent in scope and have a unique differentiated audience. |
| Film Screenings | **Description:**  Film screenings relate to screenings of feature length or short film, television programmes, or moving image, where there is a physical audience presence. Virtual reality experiences which are not a constituent part of a wider exhibition, performance, or festival, should also be included here.  **Examples:**  Cinema screenings, one-off pop-up screenings, virtual reality experiences.  **Exclusions:**  Do not include screenings of film or moving image which are part of a wider activity piece such as a screening occurring on a loop or repetitive basis as part of an exhibition or as a backdrop or constituent part of a physical performance where screened activity is not the primary activity.  Please do not include film screenings that are not part of your Arts Council agreed programme of activity, for example, commercial film programmes. |

#### Traditional Broadcasts

Does not include televised content which was primarily distributed in another way – for example a televised tour of an exhibition or recording of festival performances. This form of activity can be thought of as supplementary to the Exhibition or Festival and will be recorded as Live to Digital.

|  |  |
| --- | --- |
| Television | Any television piece created specifically for television broadcast. This includes live and recorded broadcast. |
| Radio | Any radio piece created specifically for radio broadcast. This includes live and recorded broadcast. |

#### Web-based activity

|  |  |
| --- | --- |
| Online Products | **Description**  A creative content product created to be consumed online.  **Examples**  Podcasts, Vlogs, Games, Applications, Interactive Stories, Online Learning Resources, Online Publishing  **Exclusions**  Excludes online documentation of an activity that has existed elsewhere (e.g. online version of a physical gallery or published story, a “podcast” of a radio show, digital archives).  Does not include marketing material created to promote or review a secondary programme or product. |

#### Publishing

|  |  |
| --- | --- |
| Printed Publications and E-Books | **Description**  Creation of a printed or electronic product offered for distribution or sale.  **Examples**  This includes printed books, graphic novels, photobooks, magazines and journals – along with e-books or electronic downloads of a whole packaged product or file. Includes audiobooks where the audiobook is an accessible version of existing written material.  **Exclusions**  This does not include accompanying material for a performance, exhibition etc. where the content is documentation of other work produced such as a printed programme or exhibition notes. Excludes online publication and contributions to existing publications (e.g. articles). |

### Development

|  |  |
| --- | --- |
| Development | **Description**  Provision of support or specialist consultancy, training, or assistance to another organisation and/or artists. Development activity; non-public facing.  **Examples**  Training Sessions, Industry Talks & Workshops, Consultancy, Advice Giving, Professional Services  **Exclusions**  Activity substantially aimed at members of the general public as open learning of vocational courses. |

## C4-C12: Number of Activities

You will be asked to quantify the activities selected in C3 in this section and tell us how many of these were primarily aimed at Children and Young People.

In all cases: The figure “of which, CYP specific” cannot be higher than the total number of productions as these should also be included in that figure.

### Activities for Physically Present Audiences

Relating to question(s): C4

If you select any of the Physical Audiences Activity types in C3, you will be shown this question. For all types, we want to know if they happened in England, elsewhere in the United Kingdom of Great Britain and Northern Ireland, or somewhere outside of the U.K.

There are some slight nuances when counting each activity type – in general the question can be thought of as:

* “How many did you do”
* “How many times did you do this?”

Then of each of those totals, how many were specially aimed at Children & Young People.

The following table lists activity type specific definitions and examples of how to quantify your activity with regards to activities for physically present audiences.

|  |  |  |
| --- | --- | --- |
| **Activity Type Selected** | **First Term (How many things)** | **Second Term (How many times)** |
| Performances | Productions  A “Production” is defined as a show or event that may occur once or many times. | Performances  How many times did the production occur? How many times was a talk given? |
| Film Screenings | Film Titles  This is not strictly the number of feature titles – but should be thought of as the number of unique viewing experiences. For example, a collection of short films screened together as a single event should be thought of as one title. | Film Screenings  The number of instances of screenings – i.e. how many times the Film Titles listed were screened to a distinct audience. |
| Festivals | A festival is defined as a single event which may last for more than one day and features multiple activities for which a unique audience does not exist.  If you hosted an activity which was part of a festival programme but was a distinct event, this should not be counted here. | Festival Days  Over how many days did your festival(s) occur?  Do not divide days into halves or smaller proportion, any day on which your festival was active should be counted as one day. For example, if your festival site was open for three hours per day across five days, this would count as five days. |
| Exhibitions | How many different Exhibitions did you produce? Count each exhibition as a unique collection of art of specimens. We see an exhibition as the sum of its parts, while an exhibition may re-use or feature the same constituent parts as another, if the whole is significantly different in composition or presentation, count this as an additional exhibition. | Exhibitions Days  Over how many days did your Exhibition(s) occur?  Do not divide days into halves or smaller proportion, any day on which your festival was active should be counted as one day. For example, if your exhibition was open for three hours per day across five days, this would count as five days. |

### Broadcasts and Online Activities

*Relating to question(s): C5, C6*

If you have selected Television, or Radio products in C3, then you will be asked about the number products you have created here and how many times they have aired – this figure should include repeats. In each row, the number of times aired must be greater than or equal to the number of products. The total *Of which*, rows must be less than or equal to the figure of which it is a sub-division. For example, if you made three adult radio programmes and one additional programme at younger audiences, then you should report the total of four under Number of Products, and 1 against *Of which, CYP specific.*

If you selected Online Products in C3, you will be asked simply how many of these products you created, and how many were CYP specific. The definition of Online Products can be very broad; however, it must be an independent product in its own right, not an online version of something which exists elsewhere (this should be recorded under Live to Digital).

### Publishing

*Relating to question(s): C7, C8, C9, C10, C11, C12*

If you have selected Publishing in C3 then you will be shown questions relating to this activity here. Publishing covers a wide range of activity, some of which may not apply to you. Therefore, the first question will ask you to select which publication types you produced, this will then determine which questions you are shown later. The options are:

**Printed Books** (including those also published as E-Books)

**E-Books** (published exclusively as E-Books – i.e. non-printed only)

**Magazines and Journals** (including both hard/print and electronic or online versions)

Your response to this question will determine what you are asked next.

**New and Existing Titles**

When asked about Printed or Electronic books you will be asked to separate figures into New or Existing Titles. These are defined as follows:

New Titles

A new piece of writing or literature not previously published in any form. The production of which having been completed for the first time in the past Financial Year.

Existing Titles

Any published work which had existed previously, for example a New Edition or re-print, or re-issue. Should a new E-Book be produced of a previously printed title, this should be counted as an existing title.

**Printed books**

Relating to Questions C8.1, C8.2

These questions will be asked if you selected “Printed Books” in response to C7.

The first part of this question, C8.1 refers to print (physical) copies only. C8.2 will then ask you about electronic versions of these publications. In C8.1 you will be asked to provide the Number of Titles, Print Run and Number Sold/Distributed.

Number of Titles Published relates to the total number of titles which had a print run in the last financial year.

Print Run should relate only to the number of copies produced in the last financial year.

Number Sold/Distributed may include copies produced in previous years, which have been distributed in the past year (e.g. sales of stock printed last year). As such, this figure should never by higher than ‘Print Run’ for New Titles but may be higher for Existing Titles.

You will then be asked how many of these titles have been made available as electronic books (e-books). C8.2 should relate only to the titles you also published in print (C8.1). If you produced or sold e-books not in print, these should be reported in C9.

**Exclusive E-books**

Relating to Question(s): C9

This question will be visible if you selected “E-books (non-printed)” as a response to C7.

Enter the total number of titles and sales/downloads of publications that were created as e-books only. These titles should not have been accounted for in the C8.

Number of Titles Published/Available should relate to the number of E-Books made available in the last financial year.

The Number of e-books sales/Downloads may include titles produced in previous years.

**Magazines & Journals**

Relating to Question(s): C10

This question will be visible if you select “Magazines and Journals” as a response to C7.

This question will ask for the Total Number of New Publications/Issues rather than titles. For example, if you published a single, monthly journal throughout the year, the Number of New Publications should equal 12.

**Publications for Children & Young People**

Relating to Question(s) C11

Having completed the section(s) regarding your publication types, you will then be asked how many of these were produced specifically for, by, or with, children/young people (aged 0-19). In addition, we will also ask how many of these CYP specific Titles were produced for schools.

Please note that this question refers to the number of Titles produced – not the number of copies or print run.

**Translations**

Relating to Question(s): C12

Please tell us, if relevant, how many titles you have translated from other languages into English. This figure should relate to completed translations, any on-going or partial translations should not be counted.

## C13-C15: Commissions, Productions And Presentations, and Completed Residencies

### Commissions of New Work

Relating to Questions: C13

This section **does not** refer to works your organisation has been commissioned to produce. This section is where you should report on works of art that your organisation has paid to be produced.

|  |  |
| --- | --- |
| Number of commissions | Please enter the number of new commissions, including work commissioned in the year but not yet published or presented.  In the case of performing, producing and presenting organisations, exclude new productions of established repertoire, new translations and adaptations. If your organisation has received a single grant to commission more than one piece of work, for example, a dance commission for music and choreography, and there is a strong possibility that a discrete part of that work may be performed separately in the future, count that element as an additional commission. |
| Expenditure | Please enter the amount of money committed to the commission, including artist fees and expenses. |
| Number of those that were public art commissions | By public art commissions we mean art in the public realm in its widest sense. It involves artists responding to their environment and creating temporary or permanent work for a range of urban and rural locations that are open to the public, for example in schools, hospitals, public buildings, parks, squares, markets, beaches or on public transport. |
| Number of UK artists commissioned | Enter the number of individual UK resident artists commissioned as a result of funding received in the year. One artist commissioned for two works would count as one artist commission. A UK resident is a person living legally within UK but who may not be a UK citizen. For example, an Australian person working in England on a two-year working visa is a UK resident. |
| Number of non-UK artists commissioned | Enter the number of different non-UK artists commissioned as a result of funding received in the year. |
| Public art postcodes / country | If you have completed public art commissions, provide the full postcodes of the location of this work. This will enable us to map the public art commissions that we fund. If the public art is based in an international location, please provide the country. |

**Type of Productions**

Relating to Question(s):C14

This question will only be displayed if you are a performing arts organisation (Dance, Music, Theatre). Where a field is not applicable, please enter ‘0’. ‘Productions’ includes plays, operas, musicals, ballets, full-length dance pieces and other full-length pieces. Double, triple bills etc. count as one production. Orchestras may use this section to enter the number of different programmes.

|  |  |
| --- | --- |
| Productions of new commissions | Enter the number of productions of new commissions, that is the number of new commissions first presented between 1 April and 31 March.  This may include productions created as a result of funding received in previous years and will not necessarily include all newly commissioned pieces created as a result of funding received for the current year. |
| Productions of other new work | Enter the number of new productions of other new work, such as devised work, translations and adaptations for sole- and co-productions only (excluding visiting productions). |
| New productions of established repertoire | Enter the number of productions of established repertoire. |
| Revivals | Enter the number of ‘revivals’. This relates to the number of productions rather than the number of performances. |
| Productions by visiting organisations | Enter the number of productions delivered by visiting organisations. |

**Residencies**

Relating to Question(s): C15

Please complete the table below for residencies for individual creative practitioners completed between 1 April and 31 March. Where a field is not applicable, please enter ‘0’.These should be residencies organised by your organisation and not through a third party.

|  |  |
| --- | --- |
| Residencies for UK creative practitioners | A UK resident is a person living legally within the UK but who may not be a UK citizen. For example, an Australian person working in England on a two-year working visa is a UK resident. |
| Residencies for non-UK creative practitioners | Enter the number of residencies for non-UK creative practitioners – for example, when an artist curates a programme of events remotely. |
| Expenditure | Please give the amount of money spent on residencies, including practitioner fees and expenses. |

## C16-C18: Objects: Loan Programmes, Collections and Digitisation

This section is mainly relevant to Museums and Visual Arts organisations. If you believe this section is not relevant to you, simply select “No” in response to C16.1 and C17.1

### Individual Object Loans

*Relating to questions: C16*

Any organisation who has borrowed or loaned an object (physical or digital) from its own collection or archive, to another organisation or individual should complete the section. Loans of this type can of course span several years – in order to get a consistent value for the year, we are only interested in loans which have been completed between April 1st and March 31st. Those on-going loans should not be reported here, but in a future year when they have concluded.

Should your organisation have completed any loans during this period select “Yes” to question C16.1, you will then be presented with a table to provide the total number of incoming and outgoing individual loans completed. These should be sub-divided by the location (England, Rest of UK, Rest of World) of the other party, **rather than** the place of object origin.

### Physical Collections and Object Digitisation

Relating to Question(s): C17, C18

This section is in reference to the preserving and archiving of a physical collection through digital means such as photography and scanning. It will also give us an overview of the size of your collection and help us understand the artworks/specimens/objects you hold. All questions are multiple choice or “Yes/No”. You will be asked about the size of your collection, the extent (if applicable) to which it has been digitised, and the purpose of this work.

Please note that in this context, 'digitising' objects means making copies of physical originals in digital form - for example, by scanning or photographing 2D items or transferring the contents of reels of film or audio tape into digital formats. It can also refer to 3D scanning of objects or, more loosely, any digital photography of collections.

# Section D – Your Audiences

In this section, we will ask you about your audience numbers, how you have extended your audience reach by creating digital versions of your activity, information about your use of tickets and associated income, your audience accessibility and how you interact with your audiences using online social engagement.

We’re asking you this information because we will use this information to evaluate the reach of the portfolio and identify trends in audience engagement.

***As in the Activity section, where Arts Council England funds a business plan, you should report on the audiences for your entire activity. Where we are funding a specific programme plan, you should only report on audiences for that funded activity.***

## D1-D3: Audience Numbers

Relating to Questions: D1, D2, D3

This section should relate directly to the activity which you reported against in C4, C5, and C6. In each case, you will be asked to provide the Known and/or Estimate figures for your audience.

As in section C where we asked how many of your activities were specifically aimed at Children and Young People, here we would like you to report the audience numbers for those activities separately. These, Of which, subtotals should be the total audience at those activities (not just the Children who attended). If you did not report any CYP specific activity in C4 – you will not be asked for these figures here.

### Known or Estimated Attendances

We will ask you to give estimated and/or known attendance figures. These figures are added together by Arts Council England to get the total attendance – the two figures are separate - there should be no overlap.

|  |  |
| --- | --- |
| Known | Where you know the exact number of people attending your event / consuming your content. These figures are an actual audience count, ticketed (including complimentary tickets) or counted by some other precise method e.g. online analytics. |
| Estimated | Where you do not know the exact number of people in attendance and you are providing an estimate. Do not include the known attendance already entered. This might apply to non-ticketed events such as festivals or exhibitions. |

If you know exactly how many people attended your event this should be recorded as known attendance, and the estimated attendance should be entered as zero. Please do not repeat actual attendance figures in the field for estimated attendance figures as this will lead to double counting.

For support on estimating your audiences, please visit the Audience Agency [website](https://www.theaudienceagency.org/) where there are resources available.

## D4-D8: Live to Digital

This is where we’d like you tell us how many more people have experienced your work through digital means.

Live to Digital\* activity could include:

* Simulcast / livestream performances / event cinema
* Make existing recordings of archive material / exhibits available for digital consumption
* Provide online interactive tours of real-world exhibitions / spaces
* Provide Virtual Reality / Augmented Reality experiences of existing work

*\*Definition: Live to digital – Distribution and Exhibition – the use of technologies to deliver live artistic or cultural experiences, or content, in new ways through online and offline environments.*

### Distribution types

At the beginning of this section, we will ask you which digital channels you have used to distribute your activity between 1 April and 31 March. This should include distribution of products within the reporting year that were created prior to this period. This should not include activities that were specifically and originally created for these distribution methods, these should be captured in the Activity section of the survey. Please include the number of times it was screened/televised/aired and the known and estimated audiences.

We have defined several distribution types which are listed below. At the start of this section, you will be asked to select which of these you wish to report against – this will determine which questions you are asked.

**The audiences here should not be duplicates of figures you have already entered; they should be new audience figures.**

Distribution types are defined as follows.

|  |  |
| --- | --- |
| Screening | This is when a recording or live stream of your activity is shown in a communal setting. For example, in a cinema, gallery, library or public screen.  It could also include virtual or augmented reality (VR/AR) experiences which are experienced offline. |
| Television | This is where the activity is distributed via television broadcast, with a specific broadcast time. If the activity was distributed via an online channel where users stream or download based on choices rather than programming, BBC iPlayer for example, please include this in the Online section. If it was distributed via television and then made available online, please record the appropriate elements of the activity in both television and online sections. Please do not double count any audience numbers. |
| Radio | This is where activity is distributed via radio, with a specific airing time. If it was distributed via radio and then made available online, for example ‘Listen again’, please record the appropriate elements of the activity in both radio and online sections. Please do not double count any audience numbers. |
| Online | This includes activity that was made available online. Please do not include documentation of activity. This should include distribution of creative content only. |

We will ask you for the number of products you have released against each Distribution Type, along with the Known and Estimated associated audiences. In the case of screenings, television, and radio broadcasts, we will also ask for the number of screenings or times aired. Note - the number of times aired for Live activities will equal the number of products. Please count repeats as Recorded

|  |  |
| --- | --- |
| Live | Seeing or hearing something as it is happening, not pre-recorded |
| Recorded | Product is screened/made available at a time after the activity took place |

### Examples of Live to Digital

**Example 1:** You have staged a performance for an audience in a theatre. You have made a recording of this performance, as you are going to screen it in a cinema to extend your audience reach. You would record the data from your live performances as a performance in this section, and your cinema screening as a film screening in the [Live to Digital section](#Live_to_Digital) of the survey.

**Example 2:** You have staged a performance, which has been recorded for the primary function of sharing it via a television broadcast. You would record the data as a television broadcast in this section.

**Example 3:** You have an exhibition, which is open to the public. You have created a digital walkthrough version of this exhibition, which is available on your website. You would record the live exhibition as an exhibition in this section, and the web version as an online element in the [Live to Digital section](#Live_to_Digital) of the survey.

**Example 4:** You have staged an orchestral concert for an audience in a concert hall. You have made a recording of this performance, as you are going to broadcast it via radio and then have it available on BBC Sounds Application in order to extend your audience reach. You would record the data from your live performance as a performance in this section, the radio broadcast data as a radio broadcast in the [Live to Digital section](#Live_to_Digital), and the BBC iPlayer data as an online element in the [Live to Digital section](#Live_to_Digital) of the survey.

## D9–D10: Tickets and Accessibility

This section contains questions relating to Box Office figures and Accessibility.

### Tickets

Relating to Questions D9, D10

The tickets question is presented as a single table split into columns of Activity Types for which you can provide box office information. The section will begin by asking you to choose which Activity Types (Performances, Exhibitions, Festivals, Screenings, Live to Digital Screenings) are applicable.

You will then be asked to complete a table containing the following rows. Please check each definition carefully. The table contains several auto-calculated rows which you will not be able to change – these should help you identify any possible errors.

|  |  |
| --- | --- |
| Total number of tickets available | Please enter the total number of tickets available in the year. Calculate by multiplying the number of available seats by the total number of ticketed performances. Available seats are the total number of designated places for performances etc., available to be occupied, including seats, wheelchair places and standing places. |
| Number of full price tickets sold | Enter the total number of tickets sold, not including concessionary and discounted tickets |
| Number of concessionary/ discounted tickets sold | Enter the total number of concessionary and discounted tickets sold |
| *Children and young people tickets sold* | *Of the total number of tickets sold, how many were sold as tickets for children and young people (0-19)* |
| Number of complimentary tickets given | Enter the total number of complimentary tickets that were given without fee |
| *Number of tickets for carers and support workers* | Of the total number of complimentary tickets given, how many were given to carers and support workers |
| Total ticket yield (£) | Enter the ‘total gross income’ for total ticket yield. This is the amount of income received before any deductions are made, for example VAT, credit card charges, booking fees etc. This should be reported in your annual accounts |
| Average ticket yield | Auto-calculation of total ticket yield, divided by the total number of tickets sold and the number of concessionary tickets sold |
| Total tickets (sold and given) | Auto-calculation of total tickets that have been sold or given |
| *Number of tickets sold/given online* | Of the total number of tickets that were sold and given, how many tickets were booked via an online box office / event system |

### Accessibility

Relating to Question(s): D11

This question displays a number of measures commonly implemented to support audiences and improve accessibility.In each case, you should simply select the measures which you do provide (either as standard, or on request, for the majority of your hosted activity).

## D12–D25: Social Media & Online Engagement

This section will give us insight into how you engage with your audiences online. Here we want you to tell us about how you use your main website and your social media activity.

### Your Website

Relating to Questions: D12 – D21

These questions relate to your own website (i.e. that in your own domain name which you own the rights to). If you do not own your own website, then answer “No” and you will be taken to the next section.

We will ask you several questions about your website design; whether it is optimised for mobile devices, the [level of compliance with W3C standards](http://www.w3.org/TR/UNDERSTANDING-WCAG20/Overview.html), whether you collect analytical statistics, and if so, the average number of visits and visitors per month. We will then ask you to identify the main reasons people use your website and quantify this usage where possible. Finally, we’ll ask you how you use information on your audience or visitors which is collected through your website.

### Social Media

Relating to Questions(s): D22, D23, D24, D25

The final question will ask you about the social media sites which you use, the uses of the platform, and the number of followers/subscribers (or equivalent terminology) your organisation has. If you’re a YouTube or Vimeo user, we’ll ask you some specific questions about your content – New Uploads, Views on New Uploads, Total Views on all content throughout the year (not all time, just between April and March).

If you struggle to answer any of these questions, please do reach out to your Relationship Manager or email the NPO Survey Team and we’ll do our best to support you.

# Section E: Learning and Participation

This section is about learning activity, for example workshops, seminars, talks, lectures and residencies. The definition of learning is broad and encompasses participatory activity as well as more formal education. Please do not include general audience participation within this section.

## E1-E12: Learning & Participation

Educational activity is about learning in the arts and museums (skills and techniques), about the arts and museums (knowledge and appreciation) or through the arts and museums (using them to develop in other areas such as personal and social skills or history).

We also want to know about your engagement with the community, and with other providers, and the reach of these things. We know many organisations are doing work with specific community groups, and we would like to capture this in line with the protected characteristics.

Relating to Question(s): E1, E2, E3, E4

The section will begin with several simple Yes/No or single figure questions as follows:

* Did you have a written strategy to support your work for, by and/or with Children and Young People aged 0-19 years old?
* Did you employ (a) dedicated member(s) of staff to coordinate work for, by and/or with Children and Young People aged 0-19 years old?
* How many artists did you employ to deliver work for, by and/or with Children and Young People aged 0-19 years old?
* How many Digital Learning Products\* did you produce between 1 April and 31 March.

*\*Definition: Cultural Learning Product – by this, we mean products that offer arts and cultural reflection; content about the arts and culture*

*Examples might include:*

* *Video/audio content, either for download (e.g. podcasts) or streaming, with critical commentary and/or supplementary material*
* *Maintaining a blog with commentary and cultural criticism*
* *Providing educational content or online events for schools and other audiences*
* *Providing educational interactive experiences (including games) for school and other audiences*

### Partnerships

Relating to Question(s): E5, E6

These questions will ask you about the partnerships your organisation has engaged in over the year in order to deliver Learning opportunities and activities.

If you are an Artsmark partner, please let us know the number of partnerships you have had with Artsmark schools. These are schools that have received [Artsmark](http://www.artsmark.org.uk/), as accredited by Arts Council England. Further details about Artsmark can be found online at: <https://www.artsmark.org.uk/>

There are many other types of organisations which you may have worked with over the year. Some you will have formal partnership agreements with, others you will have worked with in a more informal, but valuable way. We would like to know how many of the below types of organisations you have worked with or had meaningful engagement with. By meaningful engagement we mean that there is a tangible outcome from your relationship, or that advice/support/engagement has had a positive impact in any area of your or their organisation and/or outputs. Please count an organisation once only.

|  |  |
| --- | --- |
| Music Education Hubs | Music education hubs are groups of organisations – such as local authorities, schools, other hubs, art organisations, community or voluntary organisations – working together to create joined-up music education provision, respond to local need and fulfil the objectives of the hub as set out in the national plan for Music Education. Hubs are coordinated by the hub lead organisation, which takes on responsibility for the funding and governance of the hub. They are funded through the Department for Education. More detail and a full list of hubs is available here: <http://www.artscouncil.org.uk/music-education/music-education-hubs> |
| Bridge Organisations | Bridges are funded through Arts Council England and the Department for Education to connect the cultural sector and the education sector so that children & young people can have access to great arts and cultural opportunities. More information and a full list of Bridge organisations is available here: <http://www.artscouncil.org.uk/children-and-young-people/bridge-organisations> |
| National Youth Music Organisations | National Youth Music organisations offer invaluable opportunities and support for talented young musicians to develop their performance skills across a range of musical genres, regardless of their background |
| Libraries | This may include education outreach or partnerships |
| Museum Development providers | This relates to the nine sector support organisations delivering museum development. |
| Museums | This includes NPO funded museums, national museums and others |
| Arts Organisations | This could include NPO and non-NPO organisations, organisations with a primarily Artistic output or mission. |
| Local Cultural Educational Partnerships | An LCEP is a multi-sector partnership group, including representatives from culture and education, who work together to create a plan to join-up and improve cultural education with children and young people in their area |
| Educational Establishments | An organisation whose main purpose is to deliver CYP learning and offers a programme of learning activity e.g. preschool organisations, schools, FE and HE institutions |
| Health/wellbeing | Any organisation or institution whose main function is to promote or maintain health and/or wellbeing |
| Criminal justice | Any organisation or institution that works with offenders, ex-offenders and/or victims of crime |

### Formal & Informal Learning

Relating to Question(s): E7.1, E7.2, E8

In this section we’ll ask you about any Learning activities which you have organised over the year (for example workshops, seminars, talks, lectures and residencies). We split this into two categories - Formal & Informal and will ask you for the number of sessions/events along with total attendance (Known & Estimated) at sessions aimed at different age groups. These questions should account for both Toured and Non-Toured activity where applicable.

A ‘session’ is an individual activity, regardless of length. If a single workshop lasts all day, this would be counted as one session. This should include sessions delivered both in and out of school. Please count each session only once, classifying it against the most appropriate age group, and count all attendances against that age group (do not try to split attendances at a single event by the age of attendees). Attendance is the number of attendances rather than the number of people, e.g. one person/pupil attending two sessions counts twice.

Where your learning events were aimed at Children & Young People generally (i.e. not at a specific Key Stage or Early Years Group) then count the session and associated attendance against 0-19 mixed ages. Should your event not have had a Children & Young People majority attendance, or was not aimed at Children and Young People, then count this as “20+ (Adult or Unspecified)”.

We consider formal learning, to have pre-set learning objectives which the formal learning activity is designed to achieve. Learning can be aligned to the curriculum and may result in some form of accreditation.

Informal learning does not have structured pre-set objectives, this does not mean no learning outcomes result, just that learning objectives are not pre-determined.

The next question (E8) asks whether any of your learning sessions were focussed on a specific group. By focus we mean that the sessions were specifically aimed at participants from these groups.

If activity is focused across two groups, for example a major focus of your work is aimed at Black and minority ethnic and older people, record major under both groups. This will allow us to monitor the reach across these groups.

|  |  |
| --- | --- |
| Major focus | the sessions were specifically aimed to achieve 50% or more participants from this group |
| Minor focus | there is specific activity, however it is not aimed to achieve more than 50% of participants from the group |
| Not applicable | there is no specific focused activity for these groups |

### Arts Award

The remainder of the Learning & Participation section is focussed Arts Award. You will first be asked if you are an Arts Award Supporter and/or Arts Award Centre. If your organisation is not an Arts Award Centre, this section will be marked complete after answering this question. An Arts Award Centre is an organisation which is registered as such with Trinity College London, and has at least one trained adviser in place. Further details are available online at:

If you are an Arts Award Centre we would like to know how many awards have been completed. Should an individual have gained more than a single award, please ensure they are counted against all awards completed - the total should represent the number of awards, not the number of pupils.

We would also like to know how many members of staff are trained against each of the levels – for this question we want to know how many staff can deliver each level. For example if you have a member of staff trained in Gold, and Bronze and Silver, please ensure they are counted against both levels.

# Section F – International Activity & Touring

In this section, we’d like to know more about your international activity along with your domestic and international touring. This allows us to understand the international reach of the national portfolio, and monitor any trends in this area of work

## F1-F8: International Activity and Touring

Relating to Question(s): F1

Did your organisation undertake any international activity between 1 April and 31 March? This includes producing/receiving any activity outside of the UK, and working with international partners/clients/organisations. For example, taking arts and culture outside of the UK, bringing international arts and culture into the UK, exchanges, collaborations and so on.

Answering “No” to this question will complete this section.

### International Income

Relating to Question(s): F2

We’d like to understand more about your income from overseas. Please provide a further breakdown of your international income in the below table for both your statutory accounts for the 2021/22 financial year and actual/provisional accounts for the 2022/23 financial year.This income should have been generated only by activity taking place Outside of the U.K.

|  |  |
| --- | --- |
| Income Type | Definition |
| International Box Office | Any income generated through admission sales for your international activity |
| Donors – Overseas | Please include regular giving and one-off gifts from overseas donors |
| Trusts and Foundation – Overseas | Please include all money received from trusts, foundations and legacy bequests from overseas sources |
| Creative Europe funding | Any grants provided through Creative Europe funding, including third party funding from Creative Europe sources |
| Other EU funding | Any other funding not included above, that originated from EU funding schemes |
| Other international income | Any other international income |

### International Activity and Touring

Relating To Questions: F3.1, F3.2

This question will firstly ask you to select specific activity types which you may have undertaken between 1 April and 31 March. Select all that apply and progress to the next page. This will show you a table with your selection where you will be asked to report a quantitative value against each activity and select the international region(s) associated with the activity type.

Depending on the type of activity, the location associated may be either where the activity took place or originated from, the number reported on will also change depending on Activity Type.

When selecting regions, please group European countries with reciprocal citizens’ rights separately from Wider Europe & Central Asia. This includes: [**countries in the European Union**](https://europa.eu/european-union/about-eu/countries_en), countries within the EEA (Iceland, Norway, Liechtenstein), and Switzerland which is part of the single market. All other country regions are as described by the World Bank, please see this useful [**web page for a full list and map.**](http://datatopics.worldbank.org/sdgatlas/the-world-by-region.html)If in addition to Internationally, the activity toured Outside England, but still within the U.K, please indicate this here using the “Rest of UK” column.

|  |  |  |
| --- | --- | --- |
| Activity type: | Report on number of: | Provide Location of: |
| Co-productions / co-commissioning with international partners | Partners | Where partners usually reside. |
| Arranging for UK creative practitioners to work overseas | Practitioners | Region(s) Visited by UK Practitioners |
| Touring productions/exhibitions (including loans) abroad | Productions/ exhibitions | Region(s) Toured/ Loaned to |
| Activity that has taken place abroad, but was not part of a tour | Activities | Region(s) activity took place in |
| Borrowing objects/collections from abroad for exhibitions or long loans in the UK | Objects/ collections | Originating Region(s) |
| Hosting international creative practitioners in the UK | Practitioners | Region(s) practitioners usually reside. |
| Research with international partners | Partners | Where partners usually reside. |

### Touring Template

Relating to Questions: F4, F5, F6, F7

If you have answered “Yes” to either question F1 or F2 then you will be prompted to submit a touring template. Organisations which are not reporting touring activity but are reporting International Non-Toured work should still submit the template ensuring question F7 has been completed.

*Definition: Touring activity – where the same artistic or cultural programme or event is taking place in two or more places. This may include productions, exhibitions, readings, screening and so on, presented within your home region and can include work that was presented at your home base. By home base we mean premises owned by your organisation, or premises on which your organisation holds a long-term lease.*

If submitting a touring template please note that these figures should include any performances (for example, school matinees) specifically for young people, but should not include workshops, seminars, talks, lectures, residencies or courses.Please also include any touring you may have done through another Arts Council funding source (non-NPO). This allows us to get a complete view of touring across the national portfolio.

### Tours in England

Relating to Question(s): F5

The touring template is split into four sheets. On the first you will find this guidance, on the second, a table to enter information about tours in England. Fields in this table should be entered as followed.

|  |  |
| --- | --- |
| Field Name | Definition |
| Date from | Give the start date of the event |
| Date to | Give the end date of the event |
| Funding source | Select NPO or Other ACE funding from the dropdown |
| Venue name | Give the name of the venue you toured to |
| Venue type | Select from the dropdown |
| Venue capacity | Give the available capacity at the venue. If you used  a space within a venue, please only give the capacity  for the space, not the venue as a whole. |
| Venue region | Give the geographical region that the venue is in |
| Venue Local Authority | Give the local authority that the venue is within |
| Venue postcode | Provide the full UK postcode of the venue. This enables us to map the spread of funded activity. If you only have the first half of the postcode, enter 1AA for the last three digits |
| Nature of work | Select from the dropdown |
| Title of work | State the title of the event |
| Remount or new work | Is the event a remount of an existing work, or a new work? |
| Number of performances/exhibition days | Enter the total number of performances or exhibition days at the venue |
| Tickets available (per event) | This question only applies to venues such as theatres etc., which have a fixed capacity. For other venues enter ‘0’. |
| Total tickets available | Auto-sum of the total number of tickets available.  This should be the number of tickets available per event multiplied by the number of performances. |
| Total box office potential | This question only applies to venues such as theatres etc., which have a fixed capacity. Multiply the venue capacity by the average ticket price and give the total. For other venues, enter ‘0’ |
| Box office take – actual | This question only applies to events involving an admission charge. Please enter the actual box office take excluding VAT |
| Actual attendance | Give the actual number of attendees at your event |
| Estimated attendance | Give the estimated attendance at the event. If the activity was part of a larger event (such as a festival etc), please estimate the number of people your specific activity reached |

### Rest of U.K. and International Tours

All international figures will be treated as estimates. Please complete the table as above, however include Venue country in place of region, local authority and postcode.

### Rest of U.K. and International Non-Touring Activity

We also want to know about any international activity you presented that did not form part of a tour. This allows us to get a full view of where the portfolio’s activity is taking place internationally and will enable us to map this information. Please complete the table as above, providing information on your non-toured rest of UK and international activity. This could include festivals, performance, exhibitions etc., which take place in one location.

# Section G – Sector Support & Bridges

This section will vary according to your organisation type.

## G1-G5: Sector Support and Bridge Organisations

### Sector Support Organisations

Relating to Question(s): G1

We’d like to know more about how our sector support organisations are working across the National Portfolio. The survey will display a full list of Sector Support Organisations, please select all of those with whom you have had meaningful contact between 1 April and 31 March.

Please select all that apply. By meaningful engagement, we mean that their advice/support/engagement has had a positive impact in any area of your organisation and/or outputs.

### Bridge Organisations

Relating to Question(s): G2, G3, G4, G5

This section is specifically for Bridge Organisations to complete – if you are not a Bridge Organisation these questions will not be displayed to you and this section will end following completion of question G1.

For the organisation types listed in G3, G4, and G5 on the Question Template, please let us know how many you have had ‘meaningful contact’ with over the past twelve months. ‘Meaningful contact’ is defined as any interaction at level 2 or 3:

1. Passive recipient (e.g. recipient of invitation, newsletter, bulk mailing etc.)
2. Actively engaged (i.e. an active responder, enquirer or attendee)
3. Working together (i.e. where a dialogue is established, or agreements are in place)

Level 1 contact is not classed as ‘meaningful contact’ for the purpose of this reporting and should not be included in your figures.

Please also identify how many of each Organisation type represent new relationship.

# Change Log

Where we have made changes to the survey, these are detailed here. If you require any further clarification on any of these changes, please contact your Relationship Manager in the first instance.

## Additional Questions

No questions have been added for the 2022/23 survey

## Removed Questions

Section H: Impact of Coronavirus has been removed for the 2022/23

## Amendments of Questions

No questions have been amended in the 2022/23 survey

# 

# Useful Links

### Arts Council Resources

General guidance for NPOs

<http://www.artscouncil.org.uk/national-portfolio-2018-22/our-investment-2018-22-helpful-documents>

Annual Survey Information, datasets, guidance, templates.

<https://www.artscouncil.org.uk/our-data/our-npos-and-annual-data-survey>

Diversity Report

<http://www.artscouncil.org.uk/diversity/equality-and-diversity-data>

### Workforce Guidance – Further Reading

Ethnicity Data Collection Advice

<http://webarchive.nationalarchives.gov.uk/20160106185816/http://www.ons.gov.uk/ons/guide-method/measuring-equality/equality/ethnic-nat-identity-religion/ethnic-group/index.html>

Neurodiversity

<https://archive.acas.org.uk/neurodiversity>

LGBT

[www.stonewall.org.uk/at\_work/research\_and\_guides/4907.asp](http://www.stonewall.org.uk/at_work/research_and_guides/4907.asp)

Diversity Reports

<http://www.artscouncil.org.uk/diversity/equality-and-diversity-data>

Apprenticeships

[www.apprenticeships.org.uk](http://www.apprenticeships.org.uk)

Statutory Reports and Full Survey Datasets

<http://www.artscouncil.org.uk/annual-submissions-report>

GDPR

<https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/>

Socio-Economic Research

<https://livingwithdata.org/whats-new/measuring-social-mobility-in-the-creative-and-cultural-industries/>

Jerwood Arts Toolkit

<https://jerwoodarts.org/projects/weston-jerwood-creative-bursaries-2017-19/toolkit/>

PANIC Report

<https://createlondon.org/wp-content/uploads/2018/04/Panic-Social-Class-Taste-and-Inequalities-in-the-Creative-Industries1.pdf>

### Audiences

The Audience Agency

<https://www.theaudienceagency.org/>

Digital Culture Survey 2013-2019

<https://www.artscouncil.org.uk/developing-digital-culture/digital-culture-2013-2019>/

W3C - A Guide to Understanding and Implementing Web Content Accessibility Guidelines (WCAG)

<https://www.w3.org/TR/UNDERSTANDING-WCAG20/Overview.html>

### Learning and Participation

Arts Award

<http://www.artsaward.org.uk/>

Artsmark

<http://www.artsmark.org.uk/>

# Index

Contents

[Introduction to the Annual Survey 3](#_Toc90388729)

[Data Collection 3](#_Toc90388730)

[Contact Details 3](#_Toc90388731)

[Completing the Survey 4](#_Toc90388732)

[First Steps 4](#_Toc90388733)

[Online Credentials 5](#_Toc90388734)

[Navigation 5](#_Toc90388735)

[Sign-off and Submission 6](#_Toc90388736)

[Validation 6](#_Toc90388737)

[Section A – Organisational Profile and Workforce 7](#_Toc90388738)

[Introduction to Section A 7](#_Toc90388739)

[A1-A29: Workforce Definitions and Key Terms 7](#_Toc90388740)

[Contract Types 7](#_Toc90388741)

[Staff Type Definitions 8](#_Toc90388742)

[Agency & Third-Party Staff 8](#_Toc90388743)

[Staff with Multiple Positions 8](#_Toc90388744)

[Not Known or Prefer Not to Say? 9](#_Toc90388745)

[Full & Part Time Staff 9](#_Toc90388746)

[Diversity Data 9](#_Toc90388747)

[Gender Diversity 9](#_Toc90388748)

[Age 10](#_Toc90388749)

[Disability 11](#_Toc90388750)

[Neurodiversity 11](#_Toc90388751)

[Ethnicity 11](#_Toc90388752)

[Sexual Orientation 12](#_Toc90388753)

[Socio-Economic Background 13](#_Toc90388754)

[Volunteer Hours 15](#_Toc90388755)

[A22-A29: Board & Leadership 15](#_Toc90388756)

[A30-A33: Sponsorship & Nationality 16](#_Toc90388757)

[Sponsorship 16](#_Toc90388758)

[Non-UK Nationals 17](#_Toc90388759)

[A34-A39: Training, Skills, & Accessibility 17](#_Toc90388760)

[Internships, Apprenticeships, and Work Experience 17](#_Toc90388761)

[HR Policies 18](#_Toc90388762)

[Section B – Financial Statements 20](#_Toc90388763)

[Introduction to Finance Section 20](#_Toc90388764)

[Financial Year 20](#_Toc90388765)

[Actual/Provisional & Statutory Accounts. 20](#_Toc90388766)

[B1-B2: Income & Expenditure 21](#_Toc90388767)

[Income 21](#_Toc90388768)

[Expenditure 23](#_Toc90388769)

[B3-B11: Financial Information and Balance Sheet 24](#_Toc90388770)

[Financial Information 24](#_Toc90388771)

[Balance Sheet 25](#_Toc90388772)

[Analysis of Funds 26](#_Toc90388773)

[Tax Relief 26](#_Toc90388774)

[Section C – Your Funded Activity 28](#_Toc90388775)

[C1-C3: Types of Activity 28](#_Toc90388776)

[Programme Focus 28](#_Toc90388777)

[Location of Activity 29](#_Toc90388778)

[Activity Types 30](#_Toc90388779)

[Development 33](#_Toc90388780)

[C4-C12: Number of Activities 34](#_Toc90388781)

[Activities for Physically Present Audiences 34](#_Toc90388782)

[Broadcasts and Online Activities 35](#_Toc90388783)

[Publishing 36](#_Toc90388784)

[C13-C15: Commissions, Productions And Presentations, and Completed Residencies 38](#_Toc90388785)

[Commissions of New Work 38](#_Toc90388786)

[C16-C18: Objects: Loan Programmes, Collections and Digitisation 40](#_Toc90388787)

[Individual Object Loans 40](#_Toc90388788)

[Physical Collections and Object Digitisation 41](#_Toc90388789)

[Section D – Your Audiences 42](#_Toc90388790)

[D1-D3: Audience Numbers 42](#_Toc90388791)

[Known or Estimated Attendances 42](#_Toc90388792)

[D4-D8: Live to Digital 44](#_Toc90388793)

[Distribution types 44](#_Toc90388794)

[Examples of Live to Digital 45](#_Toc90388795)

[D9–D10: Tickets and Accessibility 46](#_Toc90388796)

[Tickets 46](#_Toc90388797)

[Accessibility 47](#_Toc90388798)

[D12–D25: Social Media & Online Engagement 47](#_Toc90388799)

[Your Website 47](#_Toc90388800)

[Social Media 48](#_Toc90388801)

[Section E: Learning and Participation 49](#_Toc90388802)

[E1-E12: Learning & Participation 49](#_Toc90388803)

[Partnerships 50](#_Toc90388804)

[Formal & Informal Learning 51](#_Toc90388805)

[Arts Award 52](#_Toc90388806)

[Section F – International Activity & Touring 54](#_Toc90388807)

[F1-F8: International Activity and Touring 54](#_Toc90388808)

[International Income 54](#_Toc90388809)

[International Activity and Touring 55](#_Toc90388810)

[Touring Template 56](#_Toc90388811)

[Tours in England 56](#_Toc90388812)

[Rest of U.K. and International Tours 57](#_Toc90388813)

[Rest of U.K. and International Non-Touring Activity 57](#_Toc90388814)

[Section G – Sector Support & Bridges 58](#_Toc90388815)

[G1-G5: Sector Support and Bridge Organisations 58](#_Toc90388816)

[Sector Support Organisations 58](#_Toc90388817)

[Bridge Organisations 58](#_Toc90388818)

[Section H: Impact of Coronavirus 59](#_Toc90388819)

[Introduction to Section H 59](#_Toc90388820)

[Cancelled and delayed activities 59](#_Toc90388821)

[Impact on work delivered 59](#_Toc90388822)

[Narrative Responses 60](#_Toc90388823)

[Change Log 61](#_Toc90388824)

[Additional Questions 61](#_Toc90388825)

[Removed Questions 61](#_Toc90388826)

[Amendments of Questions 61](#_Toc90388827)

[Useful Links 62](#_Toc90388828)

[Arts Council Resources 62](#_Toc90388829)

[Workforce Guidance – Further Reading 62](#_Toc90388830)

[Audiences 63](#_Toc90388831)

[Learning and Participation 63](#_Toc90388832)

[Index 64](#_Toc90388833)