Annual Funding Survey (AFS)

2016/2017

Guidance Notes

These notes have been designed to support clients in receipt of Annual Funding Programme (AFP) funding. The section numbering used here is consistent with that in the survey to allow for read-across.

The survey is split into 7 sections:

1. Your organisation
2. Finance
3. Programme of activity
4. Support services to artists and arts organisations
5. Publications
6. Narrative
7. Location data (to be completed in separate Excel template)

AFP organisations are required to complete all sections with the exception of sections 4 and 5 which should only be completed by certain types of organisations – those that dedicate a significant proportion of their time to supporting artists and arts organisations and those whose core function is to produce publications.

In order to complete the survey properly, you will need to ensure your organisation has monitoring systems in place to collect information on a day-to-day basis..

Private information about individual persons compiled in the production of statistics will be treated in the strictest confidence.

Data will be stored in a secure location with access restricted to trained staff.

1	**YOUR ORGANISATION**	
	This information will help the Arts Council monitor its progress towards meeting commitments set out in the Equality Scheme and Disability Action Plan.	
	Staff	Definitions **Artistic staff** refers to dancers, actors, singers, musicians, curators, programmers, writers, designers, and includes the artistic director. This category also includes educational, marketing and audience development staff. **Managers** refer to executive or senior management staff, for example, chief executive, finance director, accountant, general manager and human resource managers. **Other staff** refers to both administrative and technical staff, e.g. finances, reception, box office or ticketing staff and sound technicians. Each member of staff should only be represented once, for example, if someone has both artistic and management responsibilities, please assign them to the role that takes up the greater part of their time. Once you have assigned an employee to an employment category, ensure that you assign them to the same category in all other questions.
1.1	**Permanent staff**	Number of permanent members of staff, both full and part-time, men and women, including the chief executive, as at **31 March 2017.** Do not include internships, apprenticeships and individuals on work experience. Count staff on fixed term contracts of 52 weeks or more as permanent. Count staff working a total of 35 hours or more a week as full-time. Staff working less than 35 hours a week should be counted as part-time. Include the chief executive under 'Managers'

1.2	**Contractual, freelance or commissioned staff**	Number of contractual, freelance, or commissioned staff employed between 1 April 2016 and 31 March 2017, for both males and females. Do not include internships, apprenticeships and individuals on work experience This includes temporary staff hired for a particular programme on short-term contract, for example, consultants and self-employed people. Such staff may be hired more than once in a year; count them once only.
1.3	**Volunteers**	Number of unpaid volunteers, both full-time and part-time for both men and women aged 16 years and over. Volunteers are those who receive no wages or salary or who receive no more than basic expenses (for example, travel costs) to benefit your organisation. **Do not include internships, apprenticeships and individuals on work experience** This refers to volunteers who actually helped between 1 April 2016 and 31 March 2017, and not those available to help. Do not include members of your board or governing body here as they will be counted later in the survey.
1.4		Total number of hours worked by volunteers between 1 April 2016 and 31 March 2017. This will enable us to calculate the value of volunteer work.
	EQUALITY MONITORING	
1.5	**Gender, ethnicity**	Please provide details of your organisation's ethnic composition relating to the board, artistic staff, managers and other staff as at 31 March 2017. Do not include internships, apprenticeships and individuals on work experience Large organisations should not include members of individual committees that are answerable to their main board.
1.6	**Gender, disability**	Number of board members, artistic staff, managers and other staff who consider themselves to have a disability as at 31 March 2017.

		Disability is defined as a physical or mental impairment which has a substantial and long-term adverse effect on a person's ability to carry out normal day-to-day activities.
1.7	**Staff, age**	Please provide information for board members, artistic staff, managers and other staff regardless of employment type (permanent, contract, full-time and part-time) employed by your organisation **as at 31 March 2017.**
1.8	**Staff, religion**	Please provide information for staff members and volunteers by religious group. Include board members, artistic staff, managers and other staff (permanent and contract, full-time and part-time) employed by your organisation **as at 31 March 2017.**
1.12	**Paid internships, apprenticeships and work experience**	Indicate how many individuals worked in these capacities within your organisation between 1 April 2016 and 31 March 2017. *Please ensure individuals are recorded only once.* **Internships**: paid or unpaid internship opportunities providing real world experience to those looking to explore or gain the relevant knowledge and skills required to enter into a particular career field. May be delivered allied to training. **Formal apprenticeships**: Paid "on the job" training often leading to an accredited qualification. **Unaccredited apprenticeships**: Informal "on the job" training that is not accredited and usually delivered on a bespoke basis by the host organisation **Work experience:** Short-term placements within the workplace for up to one year, which is typically organised through schools, colleges or business partnerships.

2.	**FINANCE**	
	These sections should be completed by every AFP organisations. Information should relate to all activity delivered, not just that funded by Arts Council of Northern Ireland. Please complete financial information relating to the period 1 April 2016 to 31 March 2017.	
	INCOME	
2.1	**Earned income**	This relates to all organisation income, generated from ticket sales and other commercial activity. Please indicate income generated in the relevant field. All income generated should be entered excluding VAT.
2.2	**Arts Council funding**	This section collects details on funding from the Arts Council of Northern Ireland. Funding should only reflect that awarded for the Financial Year 2016/2017
	Annual Funding Programme	Give the total amount of funding awarded to your organisation for the financial year 1 April 2016 to 31 March 2017.
	Other Arts Council sources	Enter funding received from other funding programmes whether lottery or exchequer based. This may include Small Grants, Intercultural Arts Program or Arts and Older People Programme. relating to the programmes: Lottery Project Funding, Small Grants, Intercultural Arts Programme, Public Art, and Capacity Building Programme.
	Other public funding	This relates to funding awarded to your organisation by other public bodies for the financial year 1 April 2016 to 31 March 2017. Include revenue and project funding, but not capital. Include funding provided by core Government Departments, Arm's Length Bodies (ALBs) and agencies. Under 'other public sources' include grants from other arts and cultural bodies, grants from universities or research boards

		In relation to European Funding, only include awards made directly from European Sources. Attribute grant amounts allocated via Northern Ireland agents (e.g. Belfast City Council) to the relevant category.
2.3	**Contributed income**	Cash resources that were given (not loaned) to the organisation in the form of a gift. It does not include Earned Income (membership dues, transaction fees, other earned revenue or Gift Aid), loans or investor proceeds. **Sponsorship**: income from business organisations as well as income from corporate membership schemes. **Donations**: Include all money received from the general public or friends (including friends/member schemes) for which no benefit is received in return. If the Gift Aid scheme was used, please include only the gross amount donated.
2.4	**Capital income**	Please tell us how much your organisation secured all sources in capital funding during the reporting period April 2015 to March 2016. Capital relates to income secured for the building projects (including construction, restoration, buying, conserving and improving land and buildings)
2.5	**EXPENDITURE**	
	Please ensure that the total core costs and total programming costs equate to the total expenditure for your organisation	
	Core costs These are the general, central costs involved in running your organisation, such as rent, heating, lighting, administration and management cost, the costs needed to run the central administration and develop the organisation. They are usually looked at as separate from programme costs, which are the costs directly linked to a particular project.	
2.6	**Salaries**	Include salaries of all permanent, contract, freelance or commissioned staff during the reporting period April 2015 to March 2016.
	Programming costs	Programme costs are which can be directly linked

		to a particular programme or project.
2.7	**Artists' costs**	List all costs that directly support artists' engagement in your programme of activity, for example course fees, materials, accommodation and subsistence.
	Volunteer expense	This includes out of pocket expenses. This is usually limited to food, drink or travel.
	Premium Costs	Costs of delivering to Section 75 groups e.g. Sign Language interpreters to cover expenses.
	Venue costs	List details of all costs associated with the hire of one or more venue
	Publication, marketing and promotion	Give details of all marketing costs associated with production specific events. This includes promotional material and associated publication costs

3	**Programme of Activity**	
3.1	**Engagement**	Depending on the type of work your organisation delivers, enter the total number of performances, participation based events, exhibitions, festivals and broadcasts delivered during 2016/2017.. **Known attendance** Please give the total 'known' engagement for the number of activities entered. These figures are an actual audience count, ticketed (including complimentary tickets) or counted by some other precise method, and should directly relate to the corresponding number of productions. **Estimated attendance** Please enter any estimated engagement for the total number of activities delivered. **Do not include the known attendance already entered**. This might apply to non-ticketed events such as festivals.
3.2	**Variance compared to 2015/16**	If there has been any significant variation in engagement figures reported compared to last year, briefly describe why this has happened e.g. change in venue due to refurbishment, greater strategic emphasis on participation based work rather than performances
3.3	**Accessibility**	Of the total numbers entered, please tell us how accessible the activty was. For example, we know that many organisations have the ability to offer a sign language interpreter but will only do so on request, therefore please state how many activities this facility was available for. **Captioning** Accessible to Deaf and/or hard of hearing people through captioning or live speech-to-text, where speech and other audio elements, ie speakers names and sound effects, are displayed on a caption unit or other display technology. Do not include subtitled productions where text is given as a

		translation or to aid the understanding of hearing audience members. **BSL** Interpretation for deaf people through British Sign Language (BSL). **ISL** Interpretation for deaf people through Irish Sign Language (ISL). **Audio description** Accessible to blind or visually impaired people through audio description, where a live commentary is delivered on the visual elements of a performance or other arts activity **Hearing support loop** Provision of hearing support through a loop system which maybe in the form of an infrared headset, neckloop, headphones, or induction coil **Wheelchair access** Accessible to wheelchair users, through the use of ramps (if necessary) and specific seating areas. **Relaxed Performances** These performances have a relaxed attitude to noise and movement and small changes made to the light and sound effects, designed to welcome people who will benefit from a more relaxed performance environment, including people with an Autism Spectrum Condition, sensory or communication impairments or a learning disability.
3.4	**Ticket Sales**	
	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 Where a reduction in the cost of admission to a charging facility, event or performance, has been made in recognition of a user's social background, profile or particular needs.
	Number of complimentary tickets distributed	**Complimentary tickets**: An admission that has been allowed to a charging space for no charge, that has been issued as a gratuity by the presenting organisation. Include admissions made at no charge for direct business reasons (for instance for business development, press and PR, as an apology or correction for customer service errors, or as part of an audience development scheme.
	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.
	Average ticket yield	Auto-calculation of total ticket yield, divided by the total number of tickets sold and the number of concessionary tickets sold.
3.5	**Targeted activity**	The Arts Council has set a number of priorities around increasing engagement in the arts by a number of different groups in society. The Arts Council would like to establish, in broad terms, the proportion of your total activity that was focused on engaging with these groups through targeted projects, workshops or focus groups. This includes attendance, participation and exhibition based activity. Please base your percentage estimate on your total engagement in 3.1.
3.6	**Collaborations**	We know you often work with a range of sectors to deliver your work, please indicate

		which sector(s) you worked with during 2016/2017. Select only 4 key sectors.

4	**Support Services to Artists and Arts Organisations**	
		This section is for the following organisations providing services (in the form of advice, information and training) to artists or other arts organisations. Information provided by other organisations will not be considered. Arts & Business; Arts and Disability Forum; Audiences Northern Ireland; The Contemporary Music Centre Ltd; Craft Northern Ireland; Dance Resource Base; Irish Traditional Music Archive; Community Arts Partnership; Visual Artists Ireland; Tyrone Guthrie Centre; Voluntary Arts Network; The Ulster Scots Agency
4.1	**Artform areas supported**	Enter the artform(s) your organisation supports. This may include a number of different areas.
4.2	**Number of members**	Enter the number of individual (artists and non-artists) and organisation members belonging to your organisation. Indicate whether members are fee paying i.e. they are required to pay to join or participate.
4.3	**Support services provided to artists**	Enter the type and type and number of support services provided to individual and arts organisations. Do not include services provided to the general public.

5	**Publications**	
	Only the Verbal Arts Centre, Poetry Ireland and Irish Pages should complete this section of the survey relating to work carried out between 1 April 2016 to 31 March 2017	
5.2	**Total number of new titles**	Enter the total number of new book titles published.
	Total number of book sales, new titles	Enter the total sales or distribution figures for new titles. This is about how many publications were sold or distributed: it is not a monetary (£) figure.
	Total number of book distribution, new titles	Enter the total sales or distribution figures for new titles. This figure should include any complimentary/free publicity distribution. This is about how many publications were sold or distributed: it is not a monetary (£) figure.
5.3	**Total number of backlist titles**	Enter the total number of backlist book titles published.
	Book sales - backlist titles	Enter the total sales or distribution figures for backlist titles. This is about how many publications were sold or distributed: it is not a monetary (£) figure.
	Book distributions - backlist titles	Enter the total sales or distribution figures for backlist titles. This figure should include any complimentary/free publicity distributed. This is about how many publications were sold or distributed: it is not a monetary (£) figure.
5.4	**e-books**	Enter the number of e-books your organisation published during the period April 2015 to March 2015. By e-books we mean a book-length publication in digital form, consisting of text, images, or both, and produced on, published through, and readable on computers or other electronic devices.

6.	**Narrative**	
	Please use this section to showcase projects your organisation delivered between 1 April 2016 and 31 March 2017. These case studies should be used to detail exceptional projects in terms of their design, implementation or impact. You **MUST** complete at least one case study, but there is an opportunity to provide up to 3.	
7	**Location Data**	
	Location postcode details	Please use the Excel file provided to record details of all activity delivered by your organisation between 1 April 2016 to 31 March 2017. This should be recorded at an individual event level. At the end of the 2016/2017 reporting period, please upload your completed template to xxx. There are three spreadsheets contained within the file, each relating to a specific area of activity: performance, participation and exhibition. Please complete those templates that reflect your organisations work for this reporting period. For each relevant spreadsheet please enter your organisations name and the postcode of your 'homebase'. By 'home base' we mean premises owned by your organisation, premises on which your organisation holds a long-term lease or the location at which you normally deliver performances. If you do not have a home base, this cell can be left blank. Include activity delivered at your 'homebase' as well as that which was toured to other venues and locations both inside Northern Ireland and further afield. Please provide as much detail as possible, including: venue name, venue type, city / town, full

		postcode (if NI), country and number of performances delivered at the venue. It is important that full postcodes are provided. Postcodes are used to establish a range of other location specific details relating to deprivation, local authority area and whether the activity was delivered within a rural or urban classified area. We do not need the postcode if the activity was delivered outside Northern Ireland. Where an activity is not location specific or delivered outside a venue (e.g. a parade or festival) please give an approximate postcode reflecting the starting point or primary location.